SWING DocPublisher

User's Manual

SWING Software

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Content

Chapter

1

Introduction

What is SWING DocPublisher?

SWING DocPublisher is a turnkey solution for the IBM Lotus Domino platform which accelerates the process of publishing and maintaining online documentation, such as standard operating policies and procedures, product specifications, training manuals, knowledge bases, and more.

The key features and benefits include:

- Online document library for MS Word documents. Library features include version control, user permissions, document locking, convenient in-place draft editing, review and approval.
- Instant online publishing. Automatically converts Word documents to browser-viewable content. Enables non-technical users to publish and update information online.
- Easy book-style navigation and search through online documentation.
- Enforced document consistency by using document templates.
- Online documentation can include additional files (e.g. video, sound, spreadsheets) in their native formats.
- E-mail notifications, periodic reviews and document expiration ensuring that the documentation is easily distributed and is always current.
- Collection of users' feedback so the organization can continuously improve its policies and procedures.

What is new in SWING DocPublisher 4.5?

- Reading Confirmation. This feature helps organizations make sure that the published documents are being read. An organization may require employees to read a document and sign off on it, thereby acknowledging that they have read and understood the document. DocPublisher makes it easy to notify users, collect signoffs, and track the whole process.
- Batch Export. This feature allows users to export documents, folders and subfolders from one DocPublisher database into another.

What was new in SWING DocPublisher 4?

- Folder-level permissions.

- HTML editor (in addition to Word). It is now possible to create documents using embedded HTML editor.
- Dynamic Navigation Tree with "type ahead" search. New tree view reduces loading time when working with large amount of documents.
- Authoring section: List of documents and subfolders
- Batch publishing or routing
- Effective Date (Publish immediately OR on Effective Date)
- Manage all users inside the application (incl. Readers)
- User selection dialog: lookup to LDAP directories
- Export view to .csv. Ability to export view content to Excel.
- Manual archiving (new Archive button)
- Improved history: links to attachments and properties
- Custom property types Date and Users
- Word 2007 .docx supported
- Workflow guidelines (user-defined text accompanying the routing form)

What was new in SWING DocPublisher 3?

The new release of SWING DocPublisher improves the way companies organize, distribute, and maintain their documentation online.

The key new features include:

- PDF conversion. It is now possible to save copies of some or all documents in PDF format. These copies can be used for high fidelity printing, reviewing…
- Search by any property (in addition to full text search).
- Color schemes. Predefined and customizable color schemes which enable users to adjust the look and feel of DocPublisher to match corporate visual identity.
- Property choices (drop-down list boxes or checkboxes) can be defined by Notes formulas.
- Improved sort for folder-based views. It is now possible to sort (ascending or descending) folder based views by any document property (custom or built in).
- Improved Select Names Dialog.

What was new in SWING DocPublisher 2?

- Custom categories and properties (metadata), plus custom views. This provides means of classifying and browsing documents in the library according to taxonomies that differ from the one implied by the folder structure.
- Outline promotion. When a Word document is being published, its outline view can be promoted to the navigation frame for easier navigation throughout the document.
- Property promotion. Data exchange between Word document properties and DocPublisher document properties.

- Workflow routing, including e-mail notifications in the edit/review/approval process.
- Document history with audit trail.
- RSS-based subscription to new or updated documents.
- Separate headers/footers for display and print.
- Bulk export. Companies can easily export the entire or any part of their DocPublisher libraries to disk, making the transition from DocPublisher to any other system as easy as possible. As a result, the risk of product lock-in is removed.
- Usability improvements (AJAX-based).

Chapter

2

Installation

In order to use SWING DocPublisher, it must be installed on Domino server running HTTP task. Server installation is required in order to be able to explore all the features of the product, as only authenticated users can create new documents, modify existing ones, change various configuration settings, etc. Installing the database on a local disk will only allow reading and searching existing documents.

System requirements

Server requirements

- IBM Lotus Domino Server versions 6 or newer.
- All Domino supported platforms.

Client requirements

- Processor and memory specifications for a typical Web application.
- Web browsers Microsoft Internet Explorer 5.5 or higher and Firefox 1.0 or higher.

Client requirements for document authoring

- Processor and memory specifications for a typical Web application.
- Web browser Microsoft Internet Explorer 5.5 or higher.
- Visual Basic 6.0 SP5 runtime module installed. This module will install automatically. It is also possible to perform manual installation by running installation package, which can be found at http://download.microsoft.com/download/vb60pro/Redist/sp5/WIN98Me/EN-US/VBRun60sp5.exe.
- Microsoft Office 2000 / XP / 2003 / 2007.

Initial installation

If you are installing DocPublisher for the first time, follow this procedure:

Step 1. Copy database to server. SWING DocPublisher database is shipped compressed in a zip archive. Unzip the archive, and copy **DocPublisher4.nsf** file to the Domino server's data directory.

Step 2. Sign the database. Prior to initial use, SWING DocPublisher database must be signed. In Domino Administrator select the server where the database has been copied, and choose the "Files" tab. You should see all the files on the selected server. Now pick the database, right click on it and select "Sign...." Now choose whether you want to sign the database (all design elements) with current server ID (we recommend this) or with your current ID. Note, however, that this ID should be able to run unrestricted agents (in your server's location document, check "Security" tab -> "Run unrestricted LotusScript/Java agents").

Step 3. Define database manager. Access Control List of the SWING DocPublisher database needs to be modified. Add yourself to the list of users, and assign yourself Manager access and **[Administrator]** role.

Step 4. (optional) Set default access level. Define default access level for the SWING DocPublisher database. You may opt to allow anonymous access to the application (if it will be used for public access, on Internet, as a knowledge base etc.). In this case, add **Anonymous** entry to the ACL, and set its access level to Reader, with no additional roles. In addition, enable the Write public documents option. If you want to prohibit anonymous access, do not add **Anonymous** ACL entry. Instead of that, add the users that you want to allow to read the documents, and set their access level to Reader with no roles (also enable the Write public documents option).

SWING DocPublisher is now ready to be opened in the web browser.

Important

Since SWING DocPublisher version 4.5 and later a new database is created when the reading confirmation feature is enabled and applied on a document. This database is named exactly the same as your DocPublisher database, but with an "_so" suffix. It contains the required information about reading confirmation and is managed by DocPublisher's internal code.

Upgrading from previous versions

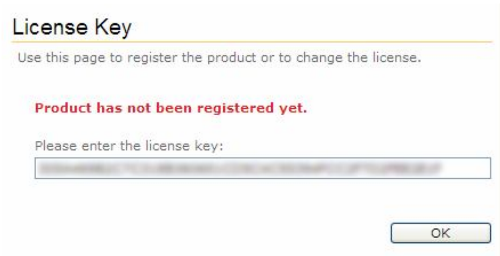
In the case you already have a copy of DocPublisher installed, follow this procedure to upgrade to the new version:

Step 1. Create a .ntf copy. SWING DocPublisher database is shipped compressed in a zip archive. Unzip the archive, and create a copy of **DocPublisher4.nsf** file, but with the **.ntf** extension and save it to the Domino server's data directory or your local directory. Note that the newly created **DocPublisher2.ntf** must be placed exactly in the data folder in order to be able to replace the design.

Step 2. Replace design. Replace design of the existing DocPublisher database with the .ntf file created in step 1.

Licensing

When you open SWING DocPublisher database for the first time, you will be prompted for a license key. Enter the license key you obtained from your vendor.



After entering the correct license key, click on the "Start using the product" action to continue using SWING DocPublisher.

After entering the correct license key, click on the "Start using the product" action to continue using SWING DocPublisher.

You will notice a "Login" button in the right top corner. Click this button to log in to SWING DocPublisher. By logging in, you will be able to access advanced options of SWING DocPublisher (content authoring and administration).

Chapter 3

Using SWING DocPublisher

SWING DocPublisher has the following application modes:

Contents Used to read documents available to document readers.

Search Used to search the document library.

Authoring Used to create or modify documents in the document library.

Administration Used to administer application settings.

Application modes can be selected by clicking on one of the buttons in the top action bar which begins with "Contents."

Reading the content of the document library

The basic layout of the application consists of three main areas:

Top action bar. Placed on top of the application window. Used to change application modes, and login to SWING DocPublisher.

Navigation/Search pane. Placed on the left side of the application window. Used to navigate and search the document library.

When "Contents" is selected on the **Top action bar** and there is at least one custom view defined, the drop-down list with all the available views will be visible (for more information about custom views see chapter **Manage views**).

Content pane. Main area of the application. Used to read and edit the documents.

Contents application mode is the initial mode, after SWING DocPublisher is opened. The first document in the navigation hierarchy is displayed in the **Content pane.**

Navigation pane. Displays the hierarchy of folders and documents. It is initially collapsed. The root entry of the navigation structure is the document library icon. The label next to the document library icon represents the name of the document library (for more information on setting the document library name, see chapter **Change library name**).

The navigation pane is used to browse the content of the document library. There are two basic operations that you can do while browsing the document library:

Expand/collapse folder. By expanding/collapsing folders, the user shows/hides its contents. Folders may contain another folder or document. Similarly, if a custom categorized view has been created, the user expands/collapses document categories in the view.

Select the document. By selecting the document in the navigation pane, it is displayed in the **content pane**.

The document displayed in the **content pane** consists of three main parts: header (on top), document itself (center) and footer (bottom). The header and footer can be customized to suit the environment where SWING DocPublisher is used (for more information about customizing the document header and footer see chapter **Customize topic header and footer**).

Searching the document library

When the number of documents contained in the document library increases significantly, it may become difficult to find the desired document. Therefore, it is possible to switch to **Search application mode** (by clicking "Search" button in the **header pane**).

Important

Content searching in SWING DocPublisher is based on the full-text search feature of Domino server. Therefore, it is necessary to enable full-text indexing of the SWING DocPublisher database.

Enabling full-text index on the database: Open the application in Administration mode, select "Full-text index" from Users, Databases and

Licensing section. When in Full-text index page, click on "To recreate full-text index, click here" link.
Ignoring certain file types in the full-text indexer: Administrators can choose to exclude various file types from the Domain Index. For example, file types such as .tiff and .jpg can consume considerable amounts of space. To ignore these file types, add the following line to the notes.ini file on the server (using an asterisk and a period before the file type name and a comma to separate multiple file types), and then restart the server:

```
FT_INDEX_IGNORE_ATTACHMENT_TYPES=*.tiff,*.jpg
```

Search terms

There are some basic rules to follow when entering search expressions:

Capitalization: Search is not case sensitive.

Example: Query *white chocolate* returns documents that contain "White", "WHITE", "white", "Chocolate", "cHoCoLaTe"…

Automatic "AND" queries: If you enter more words into the search field and separate them with spaces, the search returns only documents that contain all of the words or phrases.

Example: Query *white chocolate* returns documents that contain both words "white" and "chocolate."

Phrase search: To match the exact phrase, enclose it in double quotes.

Example: Query *"white chocolate"* returns documents that contain the exact phrase "white chocolate."

Negative terms: Put a minus sign ("-") in front of words related to a meaning you want to avoid.

Example: Query *white -chocolate* returns documents that contain the word "white" and do not contain the word "chocolate."

Logical Expressions: You can build more advanced logical expressions, using logical operators "AND" and "OR." Use parentheses ("(" and ")") to determine the order in which sections of the query are processed. A part of the query enclosed in parentheses will be processed before parts outside the parentheses.

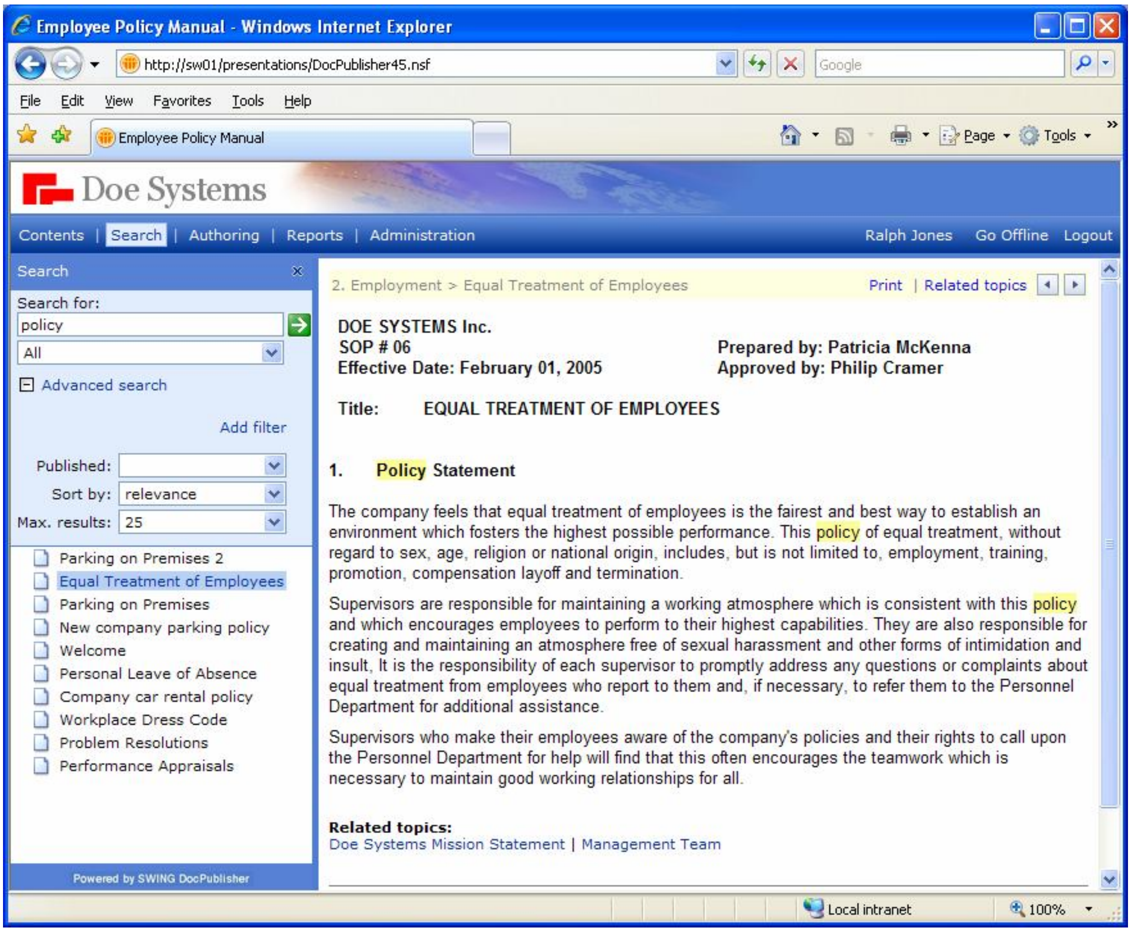
Example: Query *(white AND chocolate) OR (red AND wine)* returns documents that contain words "white" and "chocolate", contain words "red" and "wine", or contain all four words.

It is possible to perform **basic** or **advanced** search.

Basic search

Performing **basic search** is a straightforward operation. In the **search pane,** enter the desired search expression into the "Search for" field. In addition, it is possible to limit the folders that will be searched. Click on a green arrow button (or press enter), and search results appear soon. Search results are links to documents and are displayed in the lower part of the search pane.

While basic search is fast and simple, in some cases it may not be flexible enough. Advanced search can then be used.



Advanced search

Compared to **basic search, advanced search** offers some advanced settings. Advanced search parameters are as follows:

Search by: Enables searching the whole contents of the documents (Full text), or only documents' titles (Title only).

Published: Setting this parameter limits the search to documents published recently (if the document were published and withdrawn multiple times, the search takes into account date and time of the most recent publishing).

Sort by: Determines how the search results are sorted.

Max. results: Limits the number of documents returned by search operation.

Filter: Refines search by selecting one or more document properties. It is possible to filter documents by "Title", "Owner", "Version" and document publisher ("Published By").

Authoring and publishing documents

Before going into the details of content authoring and publishing with SWING DocPublisher, it is necessary to understand some basic concepts and terms that SWING DocPublisher is built on.

Document is a basic entity contained in the SWING DocPublisher database. It contains metadata (document properties), and content (information significant to the end-users).

Document content is created and modified using MS Word. Once the editing of the content is finished, it is automatically converted to HTML format. Content is saved both in MS Word and HTML formats: MS Word format so that it can be modified later, and HTML format so that it can be published for viewing with browsers only.

Draft stage is one of the most important document properties. It can have one of the following values: **Draft**, **Pending approval**, **Approved,** and **Rejected**. In addition, it is possible to define custom draft stages (for more details about defining custom draft stages, see chapter **Manage draft stages**). It is very important to understand the difference between the status **published** and other statuses.

Publishing document changes the status of the document to **published**.

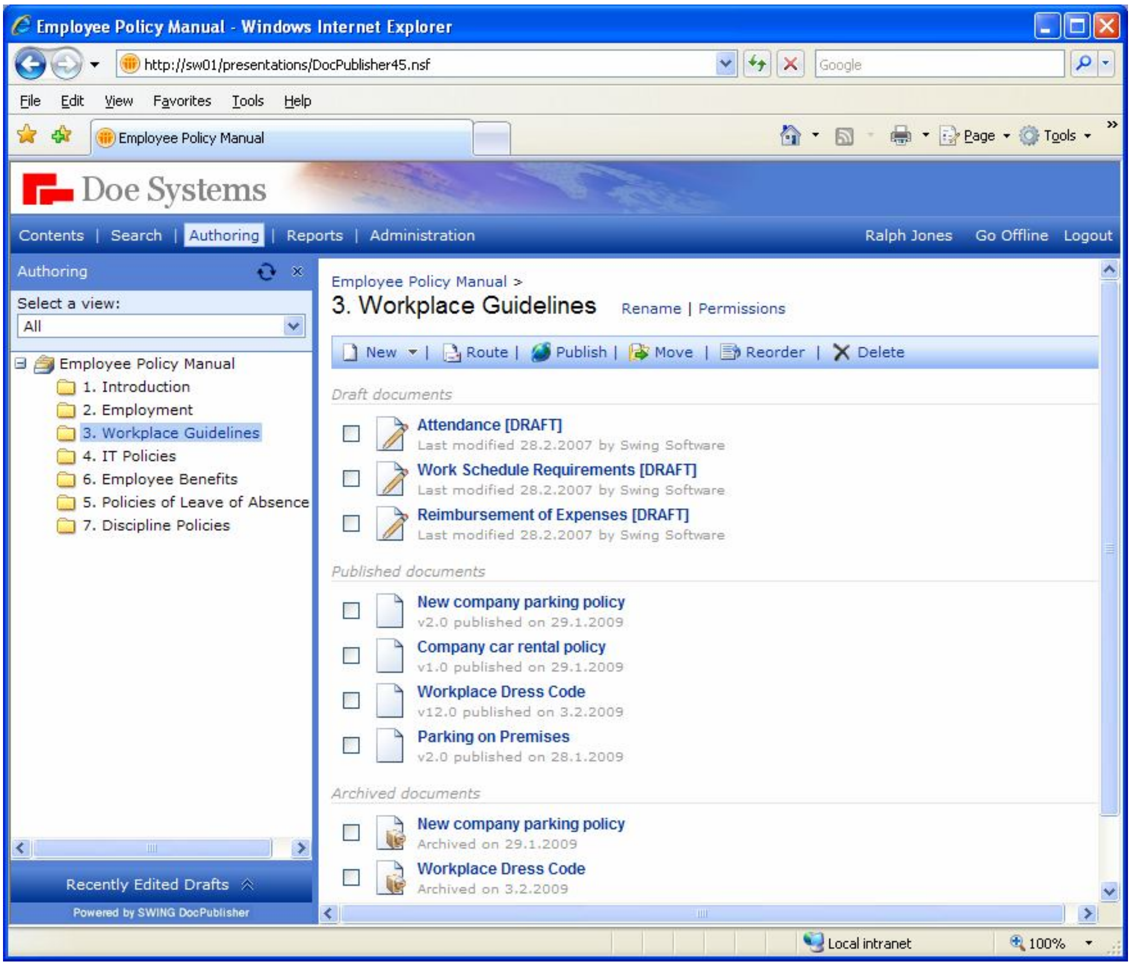
Withdrawing document changes the document's status from **published** to any other draft stage.

Draft document (not published) presents the document either in one of predefined or custom draft stages. It is only visible in the authoring application mode and is never visible in other application modes (contents and search). Its content and properties can be modified.

Published document is the document with the status set to **published**. It is available to public users as well as content authors. It can not be modified in any way. In order to be modified, it must be **withdrawn** first.

User roles Users of SWING DocPublisher can have one of the following roles: **Author**, **Content Manager,** and **Administrator**. For more details about assigning user roles and other security settings, see chapter **Manage users**. All other users that have access to the database but have no special role assigned are referred to as **readers**.

Now that the basics are explained, observe the process of creating one document and note the phases it goes through. First, to switch to the authoring mode, click on the **Authoring** button in the application header. This mode is available only to users with (at least) one of the following roles: **Author**, **Content Manager,** or **Administrator**.



Creating a folder

On top of the content pane, there is a button labeled "New". Clicking it invokes a drop-down menu. On the menu choose "New folder". In the New Folder page, fill in the folder name (e.g. "My first folder"), set folder permissions and click OK. The new folder should be visible in the content pane.

Creating a new document

To create a new document, click on the "New" icon on top of the content pane. Clicking it invokes a drop-down menu. On the menu, you can either choose "New MS Word document" or "New HTML document". This opens a new document for editing in the content pane. Note that MS Word document will allow you to use all the powerful features of Word, while HTML document can be used if there is a need for fast editing of relatively simple content.

While in edit mode, the document contains the following tabs: **Content**, **Properties, Permissions,** and **History**. Following are brief descriptions of each of the tabs, when MS Word document is selected:

Important

When editing the SWING DocPublisher document for the first time on a machine, **SWING.DocPublisher File Manager ActiveX control** should be installed automatically. If Windows XP Service Pack 2 is being used, the yellow Information Bar will be displayed on the upper border of the current Web page. It will inform the user that the Web page wants to install the ActiveX control. The user should click on the Information Bar and allow the installation of the ActiveX control. If any earlier Windows versions are being used, the modal ActiveX installation dialog will be displayed. Clicking "Yes" on that dialog allows installation of the control.

Content tab

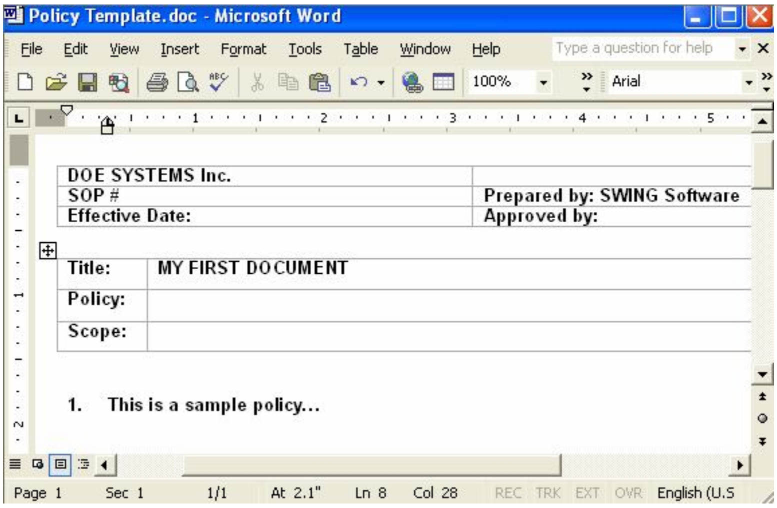
Title is used to identify the document in the library. It should reflect its content. The document is represented in the navigation pane with its title. Again, for illustrative purposes, set the title of the sample document to "My first document."

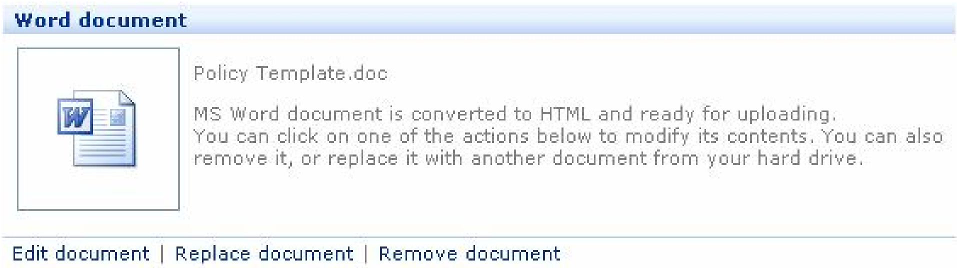
Folder presents the location in the hierarchy of folders where the document is stored.

Word document

This section is used to create or modify the content of the document. It contains the document information area (shows the current status of the MS Word file attached to the document), and actions (used to perform different operations on the MS Word document). In the new document, two actions are available: "Create new document" and "Import existing document."

Create new document action will prompt the user to choose a MS Word template that the new document will be based on. These templates are predefined in SWING DocPublisher (for more information on administering MS Word templates see chapter **Manage Word templates**). "Blank document" can also be chosen, which means that one is starting writing a new document from scratch. When the template is chosen, it is opened in MS Word for editing. This is where standard (and familiar for most users) features of MS Word can be used to edit the content of the document. After the content is inserted into the document, all that needs to be done is to click the "Save" icon in Word, and close the document. SWING DocPublisher takes care of the rest. The document is then automatically converted to HTML format and prepared for uploading to the Domino server.





Import existing document action allows users to add already existing documents from their local drives to SWING DocPublisher documents library. When the document is chosen, it is automatically converted to HTML format and prepared for uploading.

Note

It is possible to add an existing MS Word document to a SWING DocPublisher document by dragging and dropping the MS Word document from Windows Explorer to the rectangle in the Word document section.

After the content is added to the document, the document information area displays the MS Word document icon and the title of the newly added document.

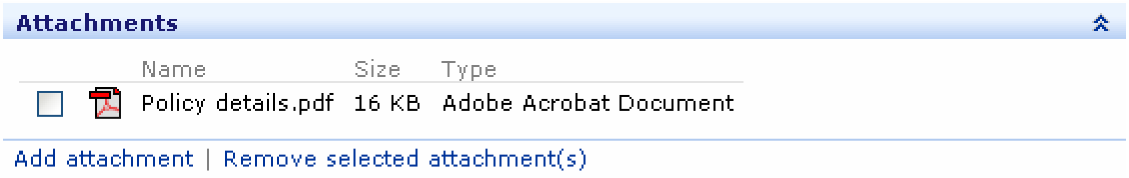
Document outline

This section is used to define how the document with multiple outline levels is displayed in the navigation pane. This section is available only if the Word document currently attached to the publication contains multiple paragraphs with different outline levels, and the DocPublisher is configured to prompt the user for the way the document outline is generated (for more information on setting this, see chapter **Configure document outline**).

It is possible to choose whether the multi-level outline is visible in the navigation pane, and how many outline levels are displayed.

Attachments

Attachments section allows users to attach some additional files related to the content of the document, regardless of their type. They are available to the end users in one of the header or footer actions (for more information about defining headers and footers, see chapter **Customize topic header and footer**). There are two basic operations (and actions): adding and removing attachments:



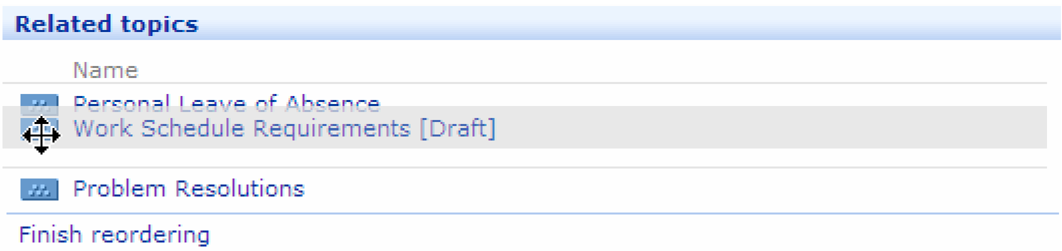
Add attachment action allows a choice of a file from the file system and attaching it to the current SWING DocPublisher document. Once attached, name, size and type of the attachment is shown.

Remove selected attachment(s) action is used to remove one or more previously attached documents. To perform this task, select the check box next to the attachment desired to be removed and click this action.

Reorder is used if one wishes to change the order in which the attachments will appear in the documents. Once in the reordering mode, drag and drop the attachments to the desired positions. Click on "Finish reordering" to confirm the changes.

Related topics

This section is somewhat similar to the **Attachments** section, with one major difference; instead of external documents, it is possible to define SWING DocPublisher documents related to the current document. Once more, there are two actions: adding and removing related topics.



Add topic action displays dialog with the navigation tree containing SWING DocPublisher documents. One can choose the documents there, and they will be added to the current document as related topics.

Remove selected topic(s) action is used to remove one or more previously added related topics. Select the check box next to the related topic wished to be removed and click this action.

Reorder is used to change the order in which the related topics appear in the documents. Once in the reordering mode, drag and drop the related topics to the desired positions. Click on "Finish reordering" to confirm the changes.

Properties tab

Document properties are attributes related to a specific document. They are used to identify and categorize the document. They can also be used to classify the document, to make the document library more organized and more accessible, and also to make searching of the database easier. There

is a number of built in document properties. In addition to that, an unlimited number of custom document properties of different types can be defined. There is more about defining the custom document properties in the chapter **Manage document properties**. Built in document properties are as follows:

Version identifies the version of a document. Because it is possible to precisely identify the version of the document, it makes document reviewing easier.

Owner is the person who is responsible for a document. He or she receives the notifications when the document is published or when it expires. This property is initially set to the current document editor, but it can be modified. Regardless of his or her role(s), any application user can be the owner of the document. The owner is always allowed to read the document.

Expiration date is the date when SWING DocPublisher will automatically mark the document as expired. If the document is published, on this date it will automatically be archived. It is also possible to configure SWING DocPublisher to send notifications to certain users when documents expire. For more information about configuring notifications, see the chapter **E-mail Notification**.

Next review due date If this property is filled in, according to notification configuration, SWING DocPublisher will automatically notify the document owner when the document needs to be regularly reviewed. It is possible to define next review as date or as interval in which the notifications will be sent. For more information about configuring notifications, see the chapter **E-mail Notification**.

Description of version can be used to enter free-form information as a quick reference to changes in the current version of the document.

Permissions tab

This section is used to define access rights for the current document.

Publication readers Initially, the document is available to all users granted access to the SWING DocPublisher application. However, it is possible to restrict access to the document to one or more users. Click "Change" action to choose readers from the Domino Directory.

Important

If access to a document is restricted, in addition to users in the **Publication readers** field, access to the document will also be granted to the document owner and the user that is currently editing the document. Also, the users with the roles **Content Manager** and **Administrator** will have access granted to all documents.

Draft editors are the users that are allowed to edit content of the SWING DocPublisher document. Initially, this field is filled with the name of the current user. It can be modified by clicking on action "Change." Any of the registered SWING DocPublisher users with at least one of the roles (**Author**, **Content Manager,** or **Administrator)** assigned can be added to the list of draft editors.

Important

It is not possible to remove the current user from the list of **Draft editors**. In addition to users in the **Draft editors** list, users with the assigned roles **Content Manager** or **Administrator** will always be granted rights for editing the document.

Signoffs tab

This tab contains information and actions necessary for collecting and tracking signoffs from users that are required to read the document and sign off acknowledging they have read and understood the document. For further information, take a look at the *Reader signoffs (reading confirmation)* section of this manual.

History tab

This tab shows valuable information about the history of the document. Each important step in the life-cycle of the document (saving as draft, changing draft stage, publishing, withdrawing, creating new revisions, changing version number, sending for review, archiving) has its corresponding record here. This way, it is very easy to have the exact overview of changes being made on the document. Each record contains the name of the author making the change, the date of the change, the draft stage (for draft documents), and the description of version (if entered by author).

In addition to records related to the draft and/or published versions of the document, by clicking on the "Show archive" link, it is possible to view the same information related to the archived versions

of the document. Once the list of history records for archived documents is opened, it is possible to delete some or all of the archives (by selecting the archive(s) and clicking on "Delete selected archives" link) or create new revision of the document based on the certain archive (by selecting an archive and clicking on "New revision from selected archive" link).

Saving the document

Once the document is completed and its properties and security are set, it is ready to be saved. It is possible to save the document as draft, or to publish it immediately.

Note

Only users with the roles **Content Manager** or **Administrator** are allowed to publish documents.

To save the document as draft, click the "Save as draft" button in the toolbar on top of the document. In the process of saving the document, the content (MS Word document, HTML files and additional attachments) is automatically uploaded to the Domino server. The progress of the upload is seen in the MS Word document information area. After the document is submitted to the server, it is shown in read mode. "My first document" is saved as draft.

Routing the document for review

By clicking on action **Route** in the toolbar, the current document can be sent for review to one or more reviewers. Where it is possible to modify version of the document and change its draft stage, "Route document" dialog box appears. Recipients are chosen from the list of registered users. The message sent to reviewers consists of the URL pointing to the current document and the comment taken from the corresponding field on the "Route document" dialog.

Previewing the document in the Authoring application mode

While in Authoring application mode, the documents look slightly different than in Contents or Search application modes. The document here contains the toolbar and tabs (Content, Properties, Permissions and History) that show the document details.

Content tab shows the document content, together with the header and footer. This is how **readers** will see the document in Content or Search application modes.

Properties tab shows document properties.

Permissions tab shows document security settings.

Signoffs tab shows signoff status of a document and also lets you view and edit the list of readers required to sign off, or to make signoff requirement inactive for a document. For further information, see *Reader signoffs (reading confirmation)* section of this manual.

History tab shows archived versions of the document. For more details about document archives, see section **Automatic document archiving** in this chapter.

Views in the Authoring application mode

In Authoring application mode, it is possible to choose the different views in the navigation pane:

All view shows all documents and folders in standard hierarchy.

Drafts by author shows only draft documents in categorized by author.

Drafts by stage shows only draft documents, categorized by document status. It is useful for browsing the documents with a certain status.

Archives shows archives categorized by year and month.

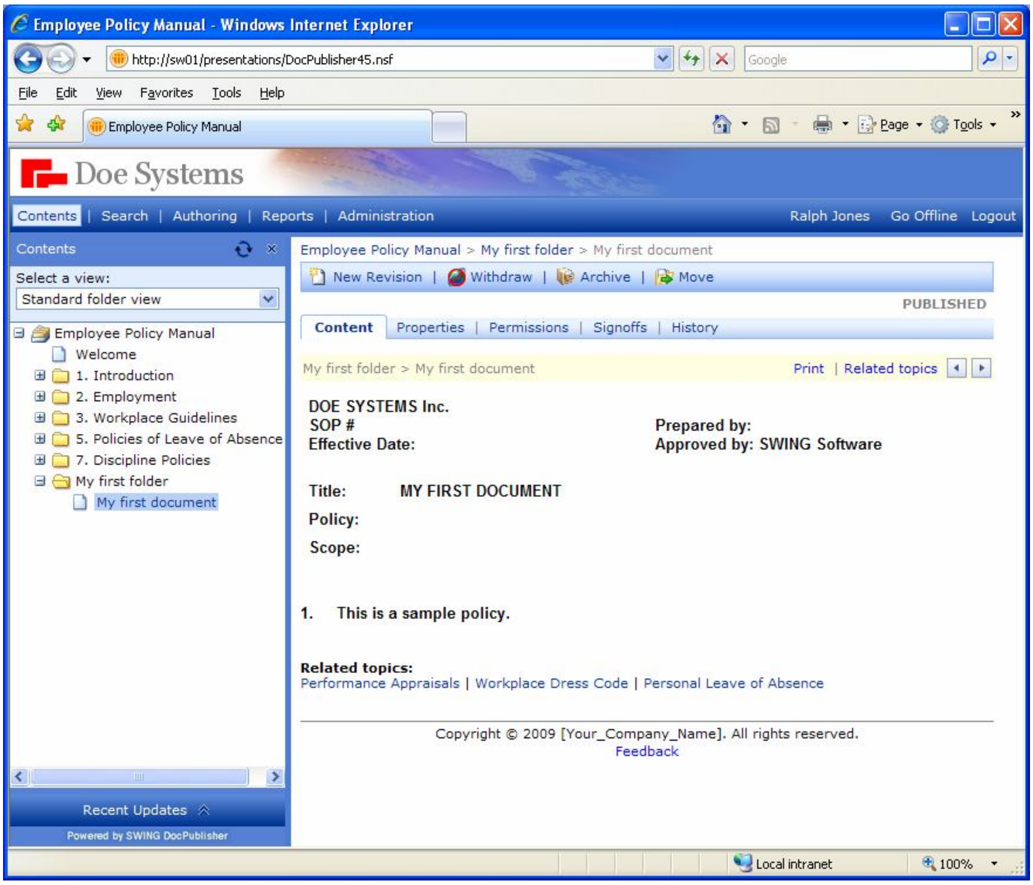
Approving or rejecting the document

Documents with draft stage set to "Pending approval" can either be approved or rejected. This can be done by clicking the appropriate link, next to the Draft stage label, on top of the Content tab. When clicked, these actions open "Approve document" (or "Reject document", if clicked on "Reject" link). The dialogs are very similar and allow the user to modify the document version, write the brief comment (when rejecting, this comment is labeled as "reason for rejecting"), and send the notification to one or more registered application users.

Publishing the document

Switch to "Drafts by status" view in the navigation pane and select "My first document" created in the previous sample.

On the toolbar, click "Publish", and the "Publish document" dialog is displayed. Publishing options can be set here. SWING DocPublisher increments the version of the document to the next major version number (e.g. 3.4 is increased to 4.0). The version can also be set manually. In addition, the description of the version can be entered here as well as the group of users to be notified when the document is published. For details about administering notification groups, see chapter **E-mail Notification**. It is possible to use the description of the version as the notification message or write a specific notification message. When "OK" is clicked, the document is **PUBLISHED**.



Creating new revisions

When the document is published, it can no longer be modified (more precisely, it cannot be modified unless it is withdrawn). New revisions can be created instead.

This chapter shows how to create and modify a new document revision.

Switch to "All" view in the navigation pane and select "My first document" created and published in the previous samples.

On the toolbar, click "New revision," and the new revision of the document is opened for editing.

Inserting link to a related topic into the document

This section shows how to modify the document contents so that it contains a hyperlink to another document in the SWING DocPublisher document library.

In the **Word document** section, click on the action "Edit document." The MS Word document is opened for editing. Switch back to the browser window and expand **Related Topics** section. Next to the desired topic, click "Copy link." The relative URL to the topic is copied to the clipboard. Switch back to MS Word document and go to the appropriate location within the document where the link is inserted. Now click Insert->Hyperlink on the MS Word menu. Go to "Address" field and paste the contents of the clipboard there. Additionally, modify the "Text to display" field with an appropriate notation and click OK. Save and close the MS Word document.

Publishing the document immediately after editing

When all necessary changes are made to the document, it is ready to be published. On the toolbar, click "Publish" button, and the "Publish document" dialog is displayed. Publishing options can be set here. SWING DocPublisher will increment the version of the document to the next major version number (e.g. 3.4 will be increased to 4.0). The version can also be set manually. In addition, the description of the version can be entered here along with the group of users that will be notified when the document is published. For details about administering notification groups, see the chapter **E-mail Notification**. It is possible to use the description of the version as the notification message or write specific notification message. Click "OK" and the document is **PUBLISHED**.

Automatic document archiving

After the document is published, it is opened in read mode. It then becomes available for archiving.

By way of illustration, at first there was the published version of the document "My first document." Then a new revision was created and published. The original version of the document was automatically archived.

A list of available archived versions of the current document (no matter whether it is draft or published document) is available on the **Archives** tab of the document opened in read mode.

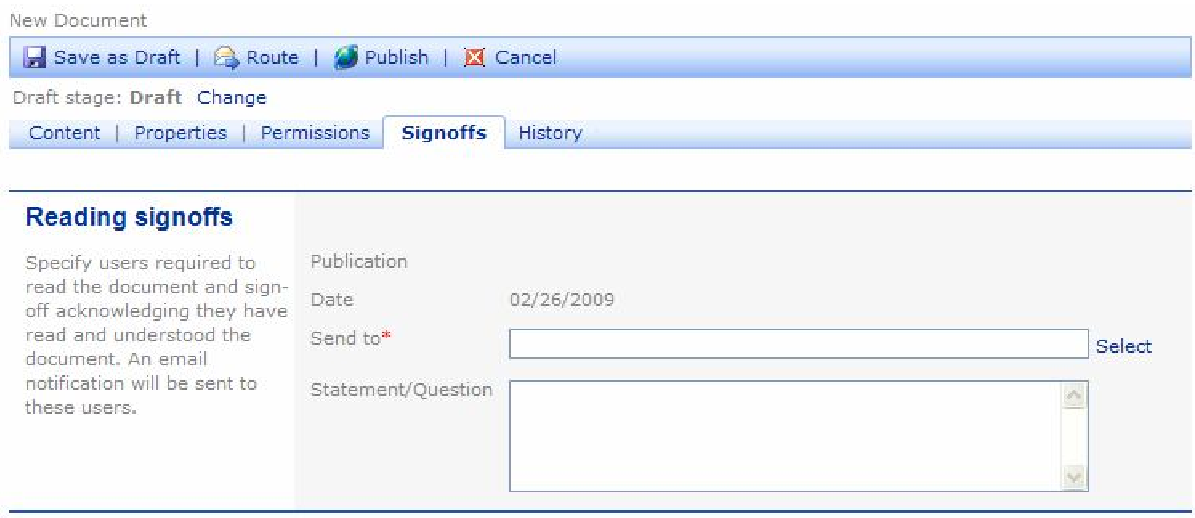
To save storage space, it is possible to delete redundant archives.

Reader signoffs (reading confirmation)

Reader signoffs is a new feature implemented in DocPublisher (since version 4.5). It helps an organization make sure that policies and procedures (and other standard documentation) are actually being read. Readers confirm that they have read and understood a document by signing it.

Creating signoff enabled documents

Creating a document that is "signoff enabled" is a normal part of document creation/editing/revision process. The signoff settings can be configured under the "Signoffs" tab.



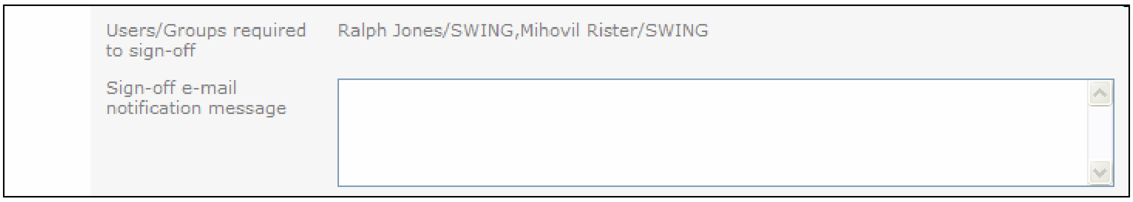
While creating a new document, the signoffs tab holds a few options. The most important are:

- Send to - this is where you specify who will be required to read and sign off on this document once it has been published. Users can be selected from your NAB. Readers in this field will receive a notification message by e-mail.
- Statement/Question – this is a statement that is shown to the signer in the signoff confirmation dialog window just before they sign the document. For example, the statement may read: "I have read the complete Internet Policy, and I agree to abide by the standard." By default, statement/question defined under signoffs localization options will be used.

When the above options are set, all that needs to be done is to publish the document.

When you are about to publish your document you will find some additional fields that were not available in other versions prior to DocPublisher 4.5. These fields are as follows:

- Users/Groups required to sign off. People (or groups) that need to sign this document are displayed in this informational item (as defined in "Send to" field, under Signoffs tab).
- Signoff e-mail notification message. Message that is incorporated on the top of an e-mail notification that is sent to all users/groups that are required to sign off on this document. The notification message consists of this text and a link to the document you are about to publish. By default, message defined under signoffs localization options will be used.

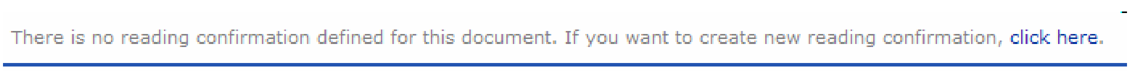


When this information has been entered you are ready to publish your sign-off enabled document or you can press "Cancel" if you wish to further edit the document. When your document is published it will also become ‘signoff enabled’ and the notifications to readers (required signers) will be sent.

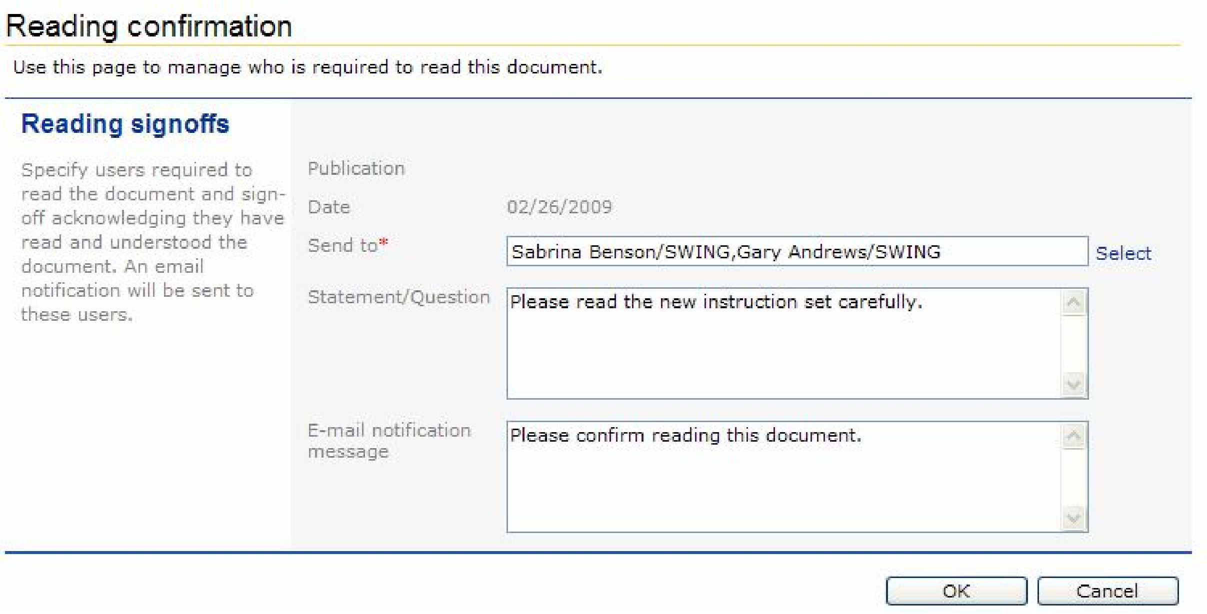
Enabling signoffs on previously published documents

The process of ‘signoff enabling’ a document from previously published or archived documents is the same as when creating a new document. Transfer your document to editing mode by creating a new revision or a revision from archive and populate the fields under the "Signoffs" tab.

Alternatively (for previously published, but not ‘signoff enabled’ documents) there is an action present on the "Signoffs" tab that will help you to ‘signoff enable’ a document in an instant.



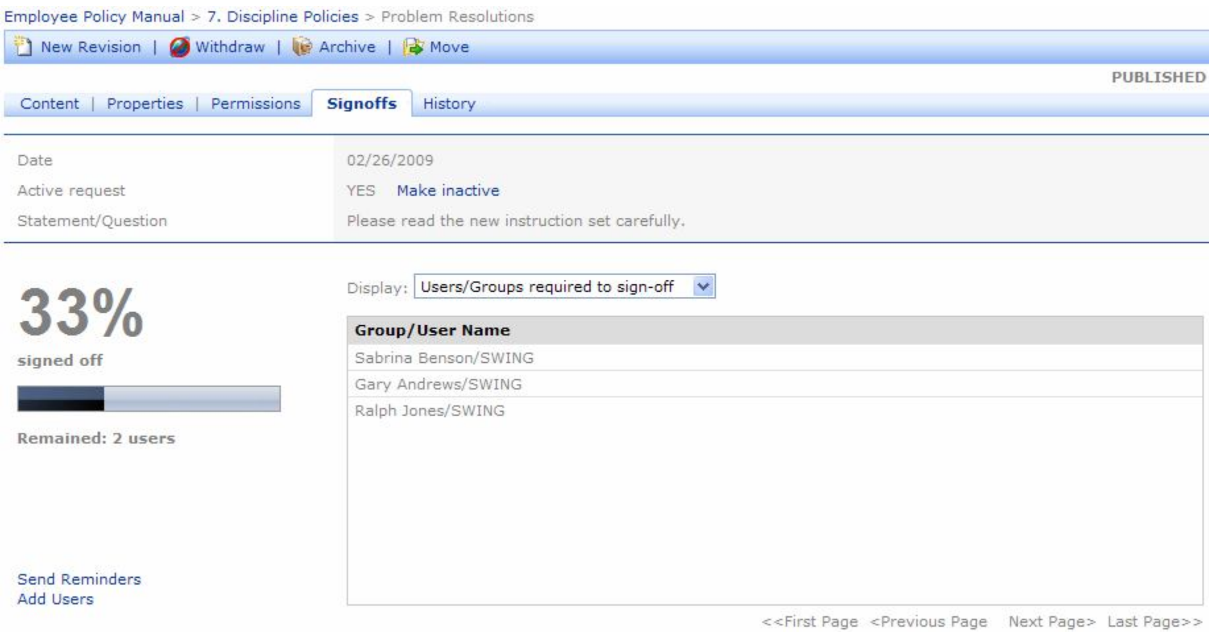
After you click on this action, a new publishing dialog will appear asking you for necessary signoff information such as send to (required signoff list) , statement/question and notification message .



After you have entered all the information and clicked on "OK", the document is automatically published, notification e-mails are sent and the document is signoff enabled.

Signoff options on a published document

The "Signoffs" tab looks a little different for documents that have been published.



It displays information about the date of publishing, active status, statement which the document owner issued, percentage of users that have already signed the document and also lists of users that are required to sign the document.

The Display dropdown box contains the following three choices:

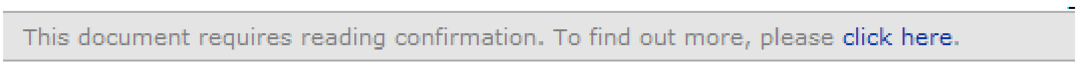
- Users/Groups required to sign off. This choice list all users or groups that need to sign this document.
- Users who have signed off. This choice lists all users that have signed off and a date when this was done.
- Users who have NOT signed off yet. This choice lists all people that are required to sign the document, but have not done so yet. The users in this list may receive an additional e-mail notification message when you click on the "Send reminders" action.

There are also few actions present on the "Signoffs" tab:

- Activity. Gives you the ability to de-activate or re-activate signoffs for this document.
- Send Reminders. Send email notification reminders to people who have not signed the document.
- Add User. This actions adds new users/groups to the signoff list.

Performing reading confirmation

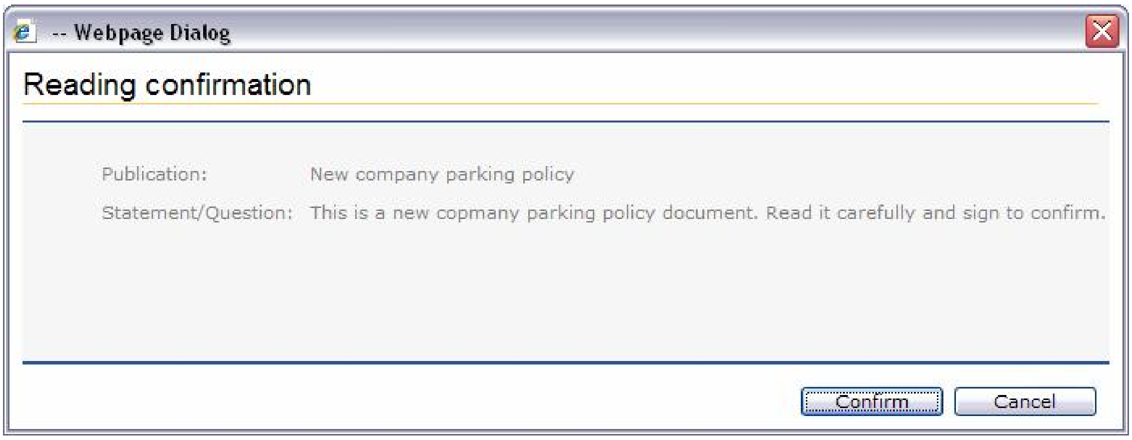
Reading confirmation (or reader signoff) is performed via a special link action that is visible to users that have not yet signed the document. This action link appears above the published document and looks like this:



Note

Reading confirmation action link will also be available to the document creator as soon as he publishes the document (if he is obligated to sign this document).

When a document readers are ready to sign the presented document, they need to click on the action which will bring up a reading confirmation dialog. This dialog provides the signer with ability to see the document title with the signoff statement and to sign the document (Confirm button) or cancel the operation.



After hitting "Confirm" (with the presented statement/question in mind), the document is considered to be signed by the reader. Reader that has signed off on a document is automatically added to the list

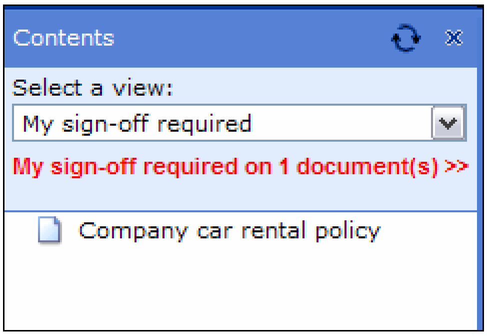
of the users that have signed this document, and the signoff statistics of the document is automatically updated.

Users that haven't singed-off on a document, usually come about to sign a document in two manners:

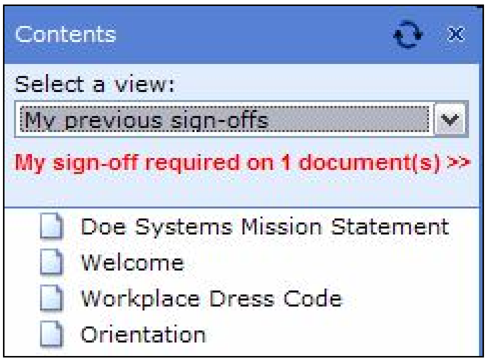
- Reading confirmation after successful login
- Reading confirmation from E-mail notification.

Reading confirmation after successful login

After you have logged in to your DocPublisher application, in the "Contents" section you will see a new display entity "My sign-off required on ‘n’ documents" in the left navigation pane. The ‘n’ represents the number of documents that you are required to sign. After clicking on it, you will see a special document view showing all the documents that require your sign-off (instead of the classic DocPublisher navigation tree). This is a new view called "My sign-off required" and you can use it at all times to check on a collection of documents that require your reading confirmation.



Another new view is also available here. It is called "My previous sign-offs" and it gives you a list of all the documents that you have previously signed. This is very useful for backtracking your signoffs and additional reassurance.



After you selected a document in the list, it will immediately be displayed in the content pane and the process of sign-off can be performed as described under the "Performing reading confirmation" section of this manual.

Note

After all required documents have been signed off, the Contents section will no longer contain "My sing-off required on ’n’ documents" message. Once a new document that you have to sign is published , the message will appear again.

Reading confirmation from E-mail notification

When a document which you are required to sign off is published, a notification e-mail message is delivered to you.

The e-mail will contain a short and instructional notification message (which has been composed by document's owner) and a link to a document that you are required to sign. When you follow that link, the document will be opened for you inside your default internet browser. Now, you can sign off on this document as described at the beginning of the "Performing reading confirmation" section of this manual. You will receive a new e-mail notification message for every new published document that requires your signoff.

Signoff reporting

From version 4.5 and higher, a new Reports button is available in DocPublisher which allows you to view statistics on document signoffs.

There are three report views available:

- Active Requests. This view displays a list of all documents that have been signoff enabled. Next to each document is the date of publishing as well as a status bar showing the number of users that have signed this document versus the total number of users required to sign. Clicking on a document in this view will open the Signoffs tab of that document where you can view more detailed information and perform additional actions as described in the "Signoff options on a published document" section.

- Inactive Requests. This view displays a Search box where you can enter the title of a signoff disabled document you are looking for. Then press Enter and a list of documents which contain the entered keyword in their titles will be displayed. Again, clicking on any document in the list will open the Signoffs tab where additional information may be viewed.

- By User. This view displays a drop down menu which contains a list of users whose signoff has been requested (for Active requests only). Selecting a user will display a list of signoff enabled documents that this user has/has not signed. You will also find a link that reads "Show inactive signoff requests". This link will display the same information, but this time only for signoff disabled documents. In this second view, there is a link that reads "Show active signoff requests" which will return you to the previous view.

Recent Updates

In version 2, SWING DocPublisher brings some new features that enable its users to be constantly informed about the recent changes made in the document library.

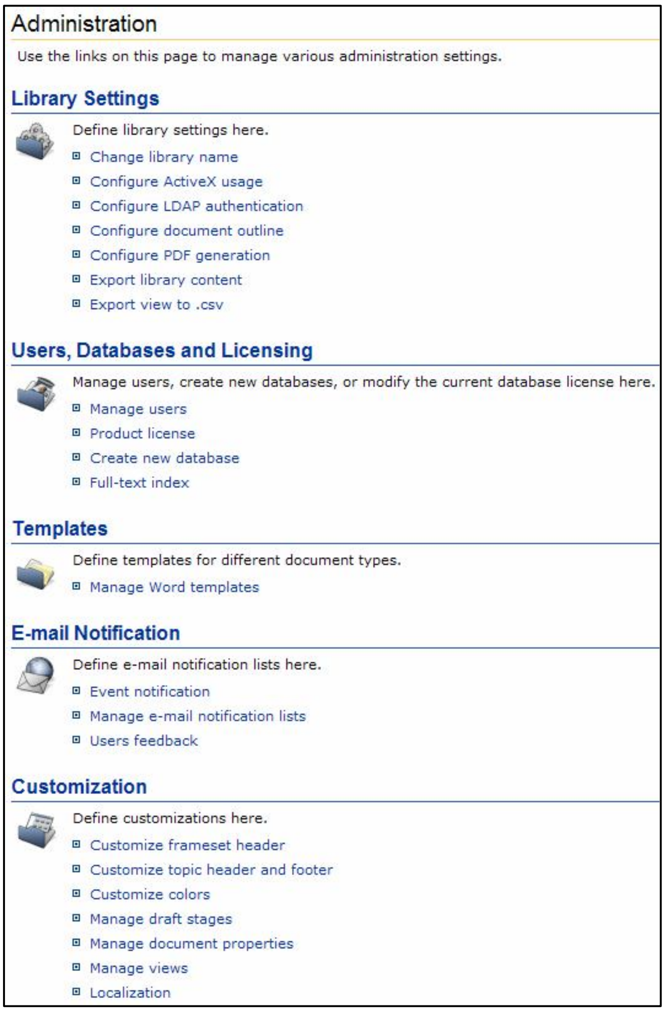
In both reading and authoring application modes, at the bottom of the navigation pane, there is a section called "Recent Updates." This section contains links which enable instant access to five recently edited documents in the library. By clicking the "More…" action at the bottom of the list, it is possible to expand this list to as many as 50 recently updated entries.

RSS

In addition to accessing recent updates through the DocPublisher interface, it is also possible to empower the feeds based on the increasingly popular RSS (Really Simple Syndication) protocol. By using any RSS reader, this allows the user to be up to date with the modifications in the DocPublisher libraries. To accomplish this, one copies the shortcut of the "Subscribe XML" link at the bottom of "Recent Updates" section and pastes it into the RSS reader. However, if the anonymous access to DocPublisher is prohibited, the user must make sure to use a RSS reader that supports server authentication.

Administering SWING DocPublisher

The Administration application mode is available to users assigned the roles of Administrator or Content Manager (however, Content Managers have limited access to certain administrative options). This mode allows administrators to modify numerous settings and customize behavior of SWING DocPublisher to suit the needs of a particular organization.



To switch to Administration application mode, click on the "Administration" button in the application header. A control panel is opened with the following options:

Library Settings

Use this section to define various basic settings.

Change library name

Library name Use this setting to set or modify the document library name. This name appears in the root node of the navigation tree in the navigation pane.

Configure ActiveX usage

This setting is to be used if you do not wish to create new documents with MS Word as the authoring tool, or if you do not use Internet Explorer, but instead use other web browsers that do not support ActiveX technology. After you have disabled ActiveX usage, you can create documents only by using the built-in HTML editor.

Configure document outline

When a MS Word document gets published, to ease the navigation, its outline view can be promoted to the navigation frame. Setting this option defines the way the outline generation is performed:

- Disable outline promotion--completely disables document outline.
- Enable promotion for up to... --sets how deep the outline promotion goes. In most cases, setting this option to three levels should be sufficient.
- Prompt user--leaves the document author to decide about the outline promotion option.

Configure PDF generation

When a document is saved in DocPublisher, in addition to convert source MS Word document to HTML format, it is also possible to save a PDF copy of it. Setting this option defines the way PDF conversion is performed:

- Never generate PDF - completely disables PDF conversion.
- Generate PDF for all documents – enables PDF conversion for all saved documents.
- Prompt user - leaves the document author to decide about creating the PDF copy of the document.

Export library content

This option enables exporting of all or part of the document library to the file system.

Library contents to export is used to select library folder whose contents will be exported (together with all subfolders). If the root folder (default) is selected, the whole library is exported.

Destination folder--Local folder, where exported documents are stored. Initially, it is set to current user's temporary folder.

Export view to .csv

This option enables exporting selected view to the file system in a standard CSV format.

View to export is used to select view whose contents will be exported. By default, "Standard folder view" is selected.

Destination folder--Local folder, where exported document is stored. Initially, it is set to current user's temporary folder.

Users, Databases, and Licensing

This section is used to manage users, create new databases, or modify the current database license.

Manage users

When this option is clicked, a list of SWING DocPublisher users is displayed. At this point, a new user can be added or existing users can be removed. When adding new users, fill the fields like this:

Step 1. Choose Users Use "Address book" dialog to choose one or more users from the Domino Directory.

Step 2. Choose roles Assign each user one or more roles. The following table shows details about allowed operations for each role:

	Reader (default)	Author	Content Manager	Administrator
Open database	X	X	X	X
Read published docs with default access	X	X	X	X
Create new folder	-	X	X	X
Rename existing folder	-	X*	X	X
Set folder permissions	-	X**	X	X
Move/Delete folder	-	X**	X	X

Create new document	-	X	X	X
Create new revision	-	X***	X	X
Edit draft	-	X***	X	X
Change draft status/Route	-	X***	X	X
Delete draft	-	X***	X	X
Move draft	-	X***	X	X
Cancel lock for editing	-	-	X	X
Publish / Reject	-	-	X	X
Move published document	-	-	X	X
Withdraw	-	-	X	X
System setup (templates, lists, etc.)	-	-	X	X
User administration	-	-	-	X

X* User who created the folder.
X** Folder is empty.
X*** User who created the document, or user is allowed to edit the document.

Click "OK" to save the changes, or "Cancel" to discard the changes.

In the "Manage Users" list, it is possible to choose one or more users. By clicking the action "Edit Selected Users Roles," it is possible to assign the same set of roles to multiple users at once. To deny users access to the application, click on the action "Remove Selected Users."

Product license

Use this option to view current licensing options (number of named users, and server name where this copy of SWING DocPublisher is registered). A new license key here can also be inserted here.

Create new database

Creates a new database from existing one, with an option to copy all or part of the current settings. Also, documents can be copied to a new database. Note, however, that the new database must reside on a same server as the existing one.

Templates

This section is used to manage MS Word templates. MS Word templates defined here are available as "starting points" when creating new MS Word documents in SWING DocPublisher documents. This feature enables consistent document layout throughout the library.

Manage Word templates

When this option is clicked, a list of defined MS Word templates is opened. New or existing MS Word templates may be added or removed here. When adding a new template, two fields must be filled in:

Template Name is the name of the template. It is used in dialogs for choosing templates.

Word Attachment Use "Browse" button to select Word document from your local drive. This document becomes available as a template for creating new documents.

E-mail Notification

This section is used to define e-mail notification options. SWING DocPublisher notification system sends notification messages to a predefined lists of users when the following events occur (actual notification only occurs for the events that are enabled):

- Document is published--this event can only occur as the result of user action.
- Document expires--SWING DocPublisher sends notification when the document expires. Expiration date is determined by **Expiration date** document property. It is also possible to have a reminder sent a few days before the actual document expiration.
- Document should be reviewed--SWING DocPublisher sends notification a few days before the document should expire. Expiration date is determined by **Next review due date** document property.

Event notification

This option is clicked to modify notification options for different events:

Document published

To enable sending notifications when the document is published, click **Send notification when the document is published**. Notification is sent to the document owner, as well as to the members of the notification list chosen on the **Publish document** dialog.

Document expired To enable sending notifications when the document expires, click action **Send notification when the document expires**. Notification is sent to the document owner and the list of addresses contained in the **Notify for all documents**. By clicking **Also remind _ days before**, the system reminds the document owner about document expiration before it actually expires.

Document regular review due soon To enable sending notifications about the document's regular review due click on the action **Send notification when the document should be reviewed**. Set how many days in advance the notification is to be sent. Notification is sent to the document owner and the list of addresses contained in the **Notify for all documents**.

Note

Each notification message contains the name of the current document library, document title, and URL of the document.

Notify for all documents

This section is used to edit the list of users that receive notification for enabled events triggered on all documents, regardless of the notification list choice on the documents or the document ownership.

Manage e-mail notification lists

This option displays the e-mail notification lists. New ones can be added, and existing ones can be modified or removed here. When editing lists, fill the fields like this:

Step1. E-Mail Notification List Name This field is used to set the name of the list. When editing documents, it is used in list boxes and dialogs.

Step 2. E-Mail Notification List Description The description of the current notification list is entered here.

Step 3. Choose E-Mail Addresses This field is filled with the comma delimited list of addresses where the notification will be sent. The "Address Book" button can be used to look up users from the Domino Directory.

Users feedback

Document headers and footers can be configured to include "Send feedback" action (for more details about configuring headers and footers see the chapter **Customize topic header and footer**). When this action is executed, the user of SWING DocPublisher can send feedback about the document. Recipients of such feedbacks are defined in this section. In addition to addresses defined here, user feedback is also sent to the document owner.

Feedback To This field is used to enter addresses where document feedback messages will be sent. The entries must be separated with line breaks.

Customization

This section is used to define different customizations.

Customize frameset header

Frameset header can be fully customized. It is possible to maintain visual identity by using organizations' logos and trademarks.

Buttons in the toolbars can be used to add new frameset header templates or to modify or delete existing ones. When editing frameset header, the title of the template must be entered in the "Title" field. "Body" field should contain the custom DHTML code. To manage the basic layout of the frameset header, it is recommended <TABLE> element be used.

It is also possible to insert images into the frameset header template. To do this, the cursor is placed in the DHTML in the position where the image should be inserted and the "Insert Image" button is clicked. The image file is chosen from the hard drive, and the appropriate DHTML code is inserted into the template. The image file is uploaded to the Domino server.

By clicking the "Preview" button on the bottom of the edit box, the header can be previewed at any time.

After editing the header template, to save the changes, click "OK."

Currently active frameset header is set using the "Set Active Header" toolbar option.

Note

To add a table background image, create a "normal" image, using "Insert Image" toolbar action. This creates an IMG tag, with a certain id. Set the style of this tag to "display:none," like this: *<IMG id="img1" src="your_image.gif" style="display:none">*. Next, in the TABLE tag, add background property with value "[ref srcid='img1']", where srcid is an id of an image inserted just

before. The TABLE tag should look like this: <TABLE border="0" cellspacing="0" cellpadding="0" background="[ref srcid='img1']">.

Customize topic header and footer

Similar to the frameset header, the topic header and footer can also be customized. This allows SWING DocPublisher users to have a consistent appearance for the whole library. Headers and footers are customized by defining header/footer templates.

Technically speaking, each SWING DocPublisher document contains a <DIV> DHTML element on its top/bottom. This <DIV> element is filled with the DHTML code defined in the header/footer templates. In addition, these DHTML templates can contain some special elements that can display a specific document's properties and perform actions upon the specific document.

Clicking the "Customize topic header and footer" action displays the list of header/footer templates. Note that lists of headers and footers are displayed on separate tabs, but both lists have identical functions. Buttons in the toolbars are used to add new header/footer templates or to modify or delete existing ones.

Follow these rules when editing the header/footer template:

Enter the title of the header/footer template in the "Title" field.

In the body field, write custom DHTML code. Be aware that this code must be placed inside DIV element. To manage the basic layout of the header and footer, it is recommended to use <TABLE> element. The real power of the headers/footers is the custom tags and functions that can be inserted. To insert specific tags, use "Insert Field" action. Specific tags are as follows:

- Topic title: <SW:TOPIC_TITLE>--displays title of the current document.
- Document owner: <SW:DOC_OWNER>--displays document owner.
- Version: <SW:VERSION>--displays document version.
- Folder: <SW:FOLDER>--displays title of the current document's folder.
- Related topics: <SW:RELATED_TOPICS>--displays comma delimited list of links to topics related to the current document.
- Attachments: <SW:ATTACHMENTS>--displays comma separated list of attachments.
- Publication date: <SW:PUBLICATION_DATE>--displays document's publication date.
- Expiration date: <SW:EXPIRATION_DATE>--displays document's expiration date.
- Url of the PDF: <SW:PDF_URL> -- displays the Url of the document copy in PDF format.

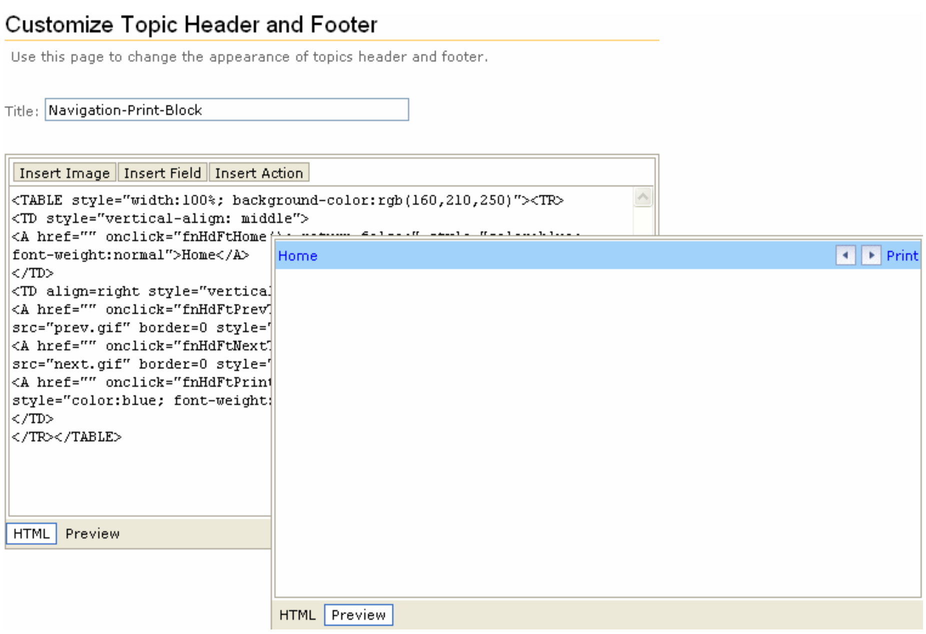
With a tag in the form of <SW:Custom property name>, this list also contains the defined custom properties. This tag displays the custom property value.

"Insert Action" action is used to insert specific action. These actions are actually calls to predefined JavaScript functions. They should be inserted inside <SCRIPT> elements or inside event handlers attached to specific DHTML elements defined in headers/footers. Available actions are as follows:

- Home: fnHdFtHome()–Navigates to the first document in the navigation hierarchy.
- Previous topic: fnHdFtPrevTopic()--Navigates to the previous document in the navigation hierarchy.
- Next topic: fnHdFtNextTopic()--Navigates to the next document in the navigation hierarchy.
- Print topic: fnHdFtPrintTopic()–Invokes the browser's print dialog.
- Related topics: fnHdFtRelatedTopics()–Shows the pop-up window with the list of links to documents related to the current document.
- Attachments: fnHdFtAttachments()--Shows the pop-up window with the list of attachments attached to the current document.
- Feedback: fnHdFtFeedback()–Opens a new window where user can write the feedback message about the current document.
- Feedback: fnHdFtSendLink()–Opens a new window where user can write any message, with document link already added to a body of a message.

Note

Depending on whether the document contains additional attachments, related topics or PDF content it is possible to define certain DHTML elements inside header/footer that are hidden automatically. To have DHTML element hidden when the document does not contain additional attachment, set the ID to "swAddAtt." To have the DHTML element hidden when the document does not contain related topics, set the ID to "swRelTop". To have the DHTML element hidden when the document does not contain PDF copy of the document, set the ID to "swPDF".



In addition, it is also possible to insert images into the header/footer templates. To do this, place the cursor in the DHTML in the position where the image should be inserted and click the "Insert

Image" button. Choose the image file from the hard drive, and the appropriate DHTML code is inserted into the template. The image file is uploaded to the Domino server.

By clicking the "Preview" button on the bottom of the edit box, the appearance of the header/footer can be previewed at any time.

When editing the header/footer template is finished, to save the changes, click "OK."

By clicking the "Activate" link next to a header/footer name in the "Customize Topic Header and Footer" list, the desired header/footer can be set. Only the active header/footer is displayed in the documents. Note that different headers/footers for display and print can be set; display header/footer is shown only on a screen, while print header/footer is visible on printed documents.

Customize colors

Customizing colors of the user interface is one of the new features implemented in DocPublisher 3. It is possible to choose one of predefined color schemes, or define custom color scheme manually. To define custom color scheme manually, select *Custom…* in the Select color scheme list. The list of separate colors and their names will appear. Enter the color as RR, GG, BB, where RR, GG and BB are values of red, green and blue component respectively.

When editing a custom color scheme, the initial values of colors are taken form the previously selected predefined scheme. E.g. in order to create custom color scheme based on *Arctic* predefined scheme, select *Arctic* first, and then select *Custom…*. Your custom scheme is now based on *Arctic* predefined scheme.

Manage draft stages

User Defined Draft Stages This is a list of statuses that can be assigned to documents. List entries are each placed on a separate line.. In addition to these draft stages, built-in draft stages are available (built-in draft stages are the following: **Draft**, **Pending approval**, **Approved**, **Rejected**, and **Published**).User defined draft stages can make SWING DocPublisher more suitable to organization-specific workflow or reviewing schemes.

Workflow Guidelines Use this field to describe your workflow. Workflow description will be presented to users when routing document.

Manage document properties

In addition to built-in document properties, it is possible to define additional, custom document properties. These properties contain additional metadata related to documents. Paired with custom views, they make a powerful and flexible combination which enables users to customize library navigation to suit their needs.

Clicking on "Manage document properties" opens a list of custom document properties. To open a new property, click on "Add New Property. Here are various possibilities available when creating or modifying a property:

Name and Type Property name is the label that appears next to the property value in all forms. Property can be of one of the following types:

- Single line of text–property is edited using a simple text box.
- Multiple lines of text–property is edited using a multi-line textbox.

- Choices–property is edited using a dropdown list, or a set of radio buttons (if multiple values are permitted).
- User Name(s) is used when property should contain user names.
- Date is used when property should contain date value.

Optional settings differ slightly for different types of custom properties. However, some settings are common for all types of properties. Those are as follows:

- Description–brief description of the property. It is displayed under the property label while editing the document, so it can serve as the help for the authors who fill in the values.
- Require that this property contains information–determines whether the property is mandatory.
- Default value–value that the property has when the document is composed initially.

In addition to these settings, for the properties of type "multiple line lines of text," it is possible to set the number of lines that are displayed while editing the document. This affects the layout of the "Properties" tab of the document while in edit mode.

For the properties of type "Choice", it is possible to define the list of possible choices in two ways: as a fixed list, or as a formula. You can use formula to look up values from different sources and offer them as choices. E.g. formula

```
@DBColumn("":""; "":"names.nsf"; "Server\\Servers"; 3);
```

returns a list of servers registered in the Domino Directory on the current server.

Additionally, properties of type "Choice" can have single or multiple values. By setting "Allow values not in list" to "Yes," it is also possible to allow users to give the property an arbitrary value.

Manage views

Sometimes, there is a need to display only a certain subset of documents, to categorize documents based on different criteria, or to modify the way document is displayed in a view. SWING DocPublisher has the ability to do all of these.

A review the process of managing views, including creating custom views follows.

Entering the "Manage views" option, enables one to see an action for changing default view settings, as well as list of all custom views currently defined. Default view is a generic view that contains all documents, displayed in folder hierarchy. This view can be disabled, in which case the first listed custom view becomes "default." Also, when the feature is enabled, it is possible to set sorting options for default view.

In v4, so called "dynamic tree view generation" is introduced, which should be a solution for large trees. Basically, this means that tree is only partially loaded and any request for a node that hasn't been loaded will be processed only when needed.

Custom views can be added using "Add new view" toolbar action. When creating custom views, there are various options that can be set:

General The view title and the way the view is organized can be set. Views can be organized in three different ways:

- Folder hierarchy--documents are organized within folders.
- Categorized--there are no folders displayed and documents are categorized based on a defined criteria.
- Flat—a plain list of documents, without folders or categories is displayed.
- Preloaded view depth - allows you to select how many in-depth levels will be loaded. This option is useful when dealing with large amount of documents and it can significantly improve view generation speed.

Display Condition It is possible to show all the documents or to define only a subset of documents that are to be displayed in a view. Document properties (both custom and built-in) can be used to define display conditions, or the Notes formula (e.g. Country = "UK" & Category = "Procedures") can be entered.

Categories This option is available only when the categorized view is selected. It allows the definition of document properties or Notes formulas that act as categories. After choosing the property and its sorting option, it can be added to a list with "Add" action. Note that the last option is "<Formula>"; it allows the entry of Notes formula as one of the categories.

Below the selected categories list, there are actions that enable editing or deleting of currently defined categories, as well as changing their order.

Documents By setting these options, the way documents are displayed in a custom view can be changed.. Either one of the properties can be selected to act as document descriptor and link for opening document content or a Notes formula (e.g. @Text(@Date(Date_Published)) + " - " + Title)can be defined. Additionally, the user can choose the way documents are sorted in a view. Documents can be sorted as created (or rearranged), alphabetically or by any document property, ascending or descending.

Localization

SWING DocPublisher offers an option to customize messages and string displayed throughout the application, thus making the library available in any desired language.

There are different portions of the application that can be translated, and these portions include: top action bar, content, search, and notification. The localization itself is done by editing default English terms and translating them to a desired language.

Currently an active language document is set by clicking on the "Use Selected Language" action, while the "Use Default Language" action sets default (English) as the currently active language.

Chapter

4

How to…

Setup and use DocPublisher with DOLS

SWING DocPublisher is designed as a Domino Web application. However, it is possible to empower Domino Offline Services to use it in offline mode. This makes SWING DocPublisher available to even wider range of "disconnected" users who have no permanent connection to corporate servers.

In order to make SWING DocPublisher available in offline mode, it is necessary to perform some additional administrative tasks on the Domino server and some configuration on the DocPublisher database itself.

Setting up DOLS on Domino server

If your organization already uses DOLS, then you might already be familiar with the DOLS installation and settings on the server.

For users to be able to take applications off-line and use only a browser to work with them, Domino Off-Line Services (DOLS) must be configured on the Domino server. Here is the procedure to follow:

To configure DOLS during Domino Server Setup

1. Under "Setup Internet services for," select "Web Browsers (HTTP services)" and click "Customize."
2. In the "Domino tasks" list, select "DOLS Domino Off-Line Services."
3. At the end of setup, when given the option to create an access control list entry, add the group "LocalDomainAdmins" to all databases and templates.
4. Accept the default option "Prohibit Anonymous access to all databases and templates." If this option is not selected, the user must open the ACL for each DOLS application and assign **No Access** to **Anonymous**.
5. The following names must be identical:
    - The TCP/IP DNS host name--In Windows, choose Start - Programs - Windows Explorer. Then choose Network Neighborhood properties - TCP/IP properties. On the DNS Configuration tab, look at the Host field.
    - The server name--Open the Server document and look at the Server name field.
    - The Internet host name--Open the Server document and look at the "Fully qualified Internet host name" field.

To configure DOLS manually

If DOLS is not configured During Domino Server Setup, it can be configured manually by editing the Server document.

1. Open the Server document.
2. Click Internet Protocols--HTTP.
3. In the "DSAPI filter file names" field, enter the DSAPI filter file name that corresponds to the operating system that the server is running, and then restart the server:
   - Win32 - ndolextn
   - Linux - libdolextn
   - AIX® - libdolextn
   - Solaris/Sparc - libdolextn
   - S390® - libdolextn
   - iSeries® - libdolextn

   Note: On the iSeries platform, the Server document is updated when a new server is configured or an existing server is modified using the CFGDOMSVR or CHGDOMSVR CL command with DOLS(*YES) specified.
4. Create a DOLADMIN.NSF database from the template DOLADMIN.NTF.
5. After the database is created, restart the Domino administrator and click the "Configuration" tab. The name of the DOLADMIN.NSF is an option in the Navigation pane.

To set up DOLS on clustered servers

Before using DOLS on a clustered Domino 6 server, make sure of the following:

- The Domino server is either a Domino Utility Server or Domino Enterprise Server.
- All servers in the cluster run the same release of Domino with DOLS
- Clustered server management is running to handle both failover of replication and HTTP
- Internet Cluster Manager is running

Subscription directories must have the same name on every clustered server. For example, if a subscription is under \data\Webmail user\7CD5957CB669AE2285256BDF00567AD8\, this name cannot be different on a different server in the cluster.

To configure DOLS on a server that uses Web Site documents

If a Web Site Document (a type of Internet Site document) is created on the Domino server, for DOLS to be enabled, the appropriate DOLS DSAPI filter filename must be added to the DSAPI field in the Web Site document. If there are several Web Site documents, the DSAPI filter filename must be added to each one. Follow these steps to add the DOLS DSAPI filter filename to a Web Site document:

1. Open the Web Site document.
2. Click the "Configuration" tab.
3. In the "DSAPI filter" field, enter the DSAPI filter file name that corresponds to the operating system that the server is running, and then restart the server:
   - Win32 - ndolextn

- Linux - libdolextn
- AIX - libdolextn
- Solaris/Sparc - libdolextn
- S390 - libdolextn
- iSeries - libdolextn

Creating a DOLS Offline Security Policy document

Use Offline Security Policy documents to set different ID policies for users in different domains. For example, IDs can be automatically generated for users inside the company, but require users in a domain outside the company to provide IDs they have been provided earlier.

To create an Offline Security Policy Document, do the following:

1. Open Lotus Domino Administrator 6.
2. Click the "Configuration" tab.
3. Click "Offline Services."
4. Click "Security."
5. Click "New Security Policy."
6. Fill out the following fields in the "Basics" tab:

Field	Description
Security domain	Enter the domain that this policy affects. For example, /US/Company, or /Company (include the leading slash). All users in this domain are subject to the deployment policy set in this document. The domain specified in this field includes users one level down from the root. For example, Cambridge/Lotus includes users in /Security/Cambridge/Lotus and /Dev/Cambridge/Lotus.
Prompt for ID during download	Choose this option. Before the subscription installs, users are asked to specify where on the computer the user ID is stored. The administrator must provide an ID to the user. This is the default ID deployment policy.
Automatically generate user IDs	Do not choose this option.
Use the Domino Directory for ID lookup	Do not choose this option.

Configuring SWING DocPublisher for offline use

In order to create offline subscription of SWING DocPublisher, a few additional tasks need to be performed. Before continuing, it is important to make sure that the following two conditions are met (do not skip there two steps, because it can cause many DOLS-related problems):

1. **DocPublisher database is signed with the server's ID.**
2. **ACL contains "Anonymous" entry, with the access set to "No access."**

Configuring the DOLS subscription

Configuration settings can be chosen for the subscription in the Offline Subscription Configuration Profile document. Even if no changes to the document are made, a configuration document in every subscription must be edited and saved. Even if the subscription has multiple databases, a subscription can have only one configuration document. The configuration document must be stored in the main database. The main database is the database in the subscription from which the user downloads the subscription.

Even after users have downloaded the subscription, configuration settings can be changed.

To edit the configuration document

1. Open the SWING DocPublisher database in Notes.

2. Choose Actions - Edit Offline Configuration to open the document. Note that some of the fields have default values, which you can change. You can use wild card characters in any field.

3. Click the Basics tab. The name of the main database should be in the "Subscription title" field. If it is not, enter it.

4. Click the Services tab and fill in the following fields.

Name of Field	Action
Domino services to install offline	Select: Basic services, Full-Text Indexing, LotusScript and unscheduled agents, Java classes and applets. Also choose a default language for the Web Control menu and the Domino Sync Manager. Users can override this setting by selecting a different language from the Web Control menu.

1. Click the Schedule tab. Use this tab to define how often will the offline subscription be synchronized with the main database. Note that the user can override most of these fields from within the Subscription Properties box of the Domino Sync Manager.

2. Click the Sync Options tab and complete the following fields:

Name of Field	Description
File Rules	
Required files to replicate	Enter the full file path to the SWING DocPublisher database, relative to the Domino data directory. Required files are databases, templates or directories that are automatically installed offline, and are replicated every time the subscription is synchronized. All required files and directories must be specified relative to the server's data directory.
Optional files to replicate	Leave blank.
Directory catalog	Leave unchecked.
Encryption	Check this box if you want your offline subscription to be encrypted on local. Encrypt this subscription: Select the box to enable encryption. Then select the level of encryption. Encryption prevents an unauthorized user from accessing the offline subscription's data using another

software product.
Note Do not encrypt the database from the Database Properties box. Use the Offline Subscription Configuration document to prevent unauthorized users from reading subscription data using other applications.

Leave all other fields with their default values.

1. On the Admin tab, you can leave all fields blank, or with the default values.

2. (Optional) At the bottom of the configuration document, select whether to display the default download page or create your own download page. The download page is what users see while they're installing a subscription. It's useful for showing instructions, company graphics, warnings, or tips. Do one of the following: Leave "Display default download page contents" selected to have the download page contain the default text and graphics. You can add text, HTML, or images in the rich-text field below the default text and graphics. Select "Display only the custom contents below" to create a download page. A rich-text field appears in which you can add text, HTML, or images.

3. Save and close the configuration document.

4. Save and close the subscription.

Setting up agents for the DOLS subscription

Agents are small programs that perform actions in a subscription. Because they can be powerful tools, they must have permission from the server to perform their actions. Agents inherit the permissions of their "signer." An agent's signer can be the user who created it, or a user or organization designated by an administrator.

It is mandatory to sign the whole SWING DocPublisher with the server’s ID before initial use. During this process, all agents are signed with the server’s IS as well.

For an agent to perform actions on a server an administrator must add its signer, or a group the signer is in, to the Server document (Security - Agent Restrictions).

Agents can perform both unrestricted actions and restricted actions. Restricted actions can potentially cause serious damage to the server, so administrators must be careful about the permissions of agents that perform restricted actions.

Do the following to make the agents work offline:

1. Create a group called "DOLS_Restricted_Agents" in the Domino Directory.

2. Add the full names of the signers of the restricted agents to the "DOLS_Restricted_Agents" group. Since DocPubliser’s agents are signed with the server’s ID, add the server’s ID to this group.

3. Create a group called "DOLS_Unrestricted_Agents" in the Domino Directory.

4. Add the full names of the signers of the restricted agents to the "DOLS_Restricted_Agents" group. Since DocPubliser's agents are signed with the server's ID, add the server's ID to this group.

5. In the Server document, on the Security tab - Agent Restrictions section, add "DOLS_Restricted_Agents" to the "Run restricted LotusScript/Java agents" field. Add "DOLS_Unrestricted_Agents" to the "Run unrestricted LotusScript/Java agents" field.

6. Make sure agent signers have at least Editor access in the ACLs of all databases where the agent runs (this condition is met by default, since the server should be the member of the "LocalDomainServers" group, which has the manager access to SWING DocPublisher database).

7. Use the DOLCert.id (in the server's Domino data directory) as the certifier ID to create cross-certificates for each user or organization you specified as being able to execute agents (server's ID in our case). DOLCert.id creates cross-certificates issued by "O=DOLS." There may already be cross-certificates issued by the Lotus Domino 6 server for these names. You can use the ID file or public key for the agent user and organization to generate cross-certificates.

Note If a database uses agents, make sure they're all signed and that the server's CERT.ID is cross-certified with the DOLCERT.ID.

Setup and use DocPublisher with DAOS

Domino Attachment and Object Service (DAOS) is a new feature of IBM© Domino© Server 8.5 that facilitates attachment consolidation. You can find out more about this in IBM© Domino© Admin documentation.

If you wish to include SWING DocPublisher databases in your DAOS catalog then you should do one of the following:

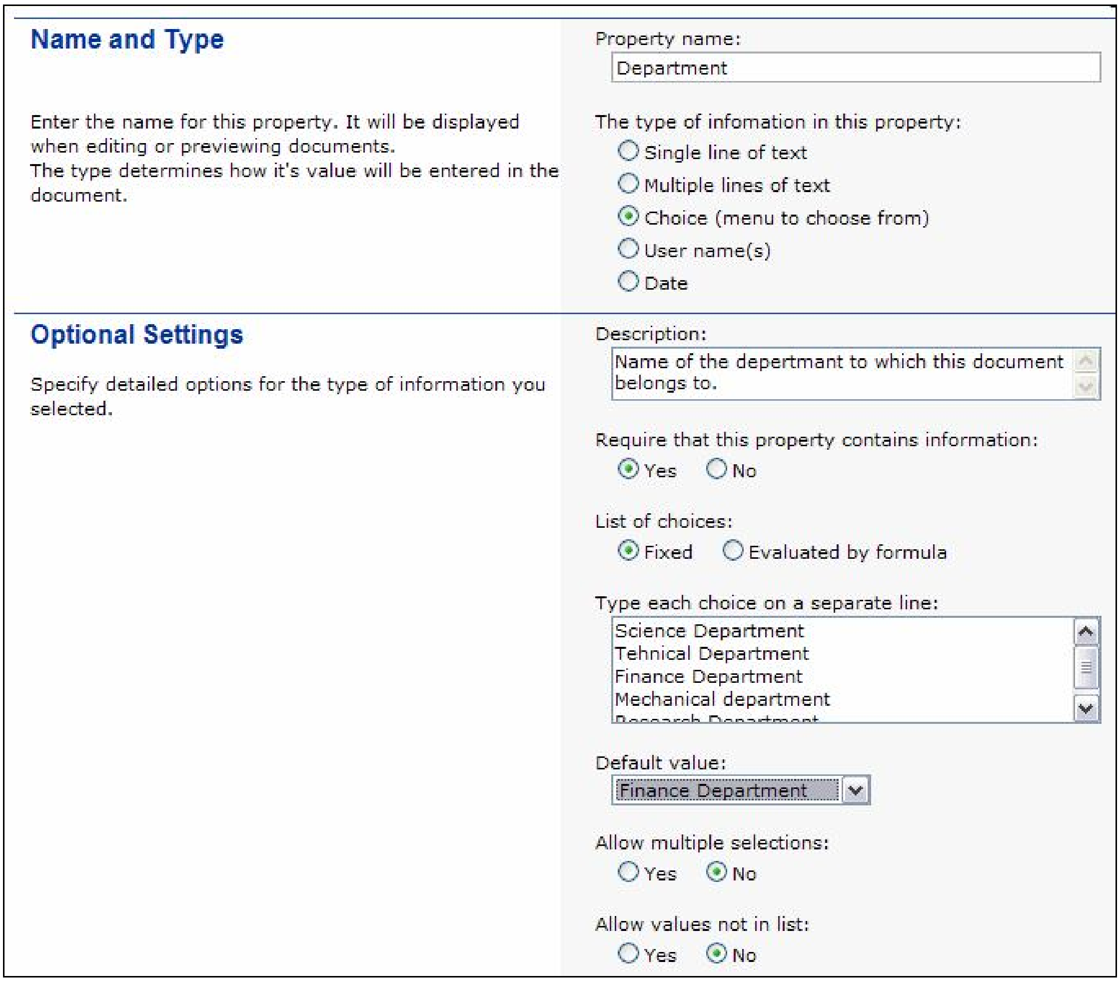
- Make sure your SWING DocPublisher database is located on an 8.5 IBM© Domino© Server. Raise the ODS version of your database by doing a copy style compaction and select the "Domino Attachment and Object Service" option from Advanced properties of your IBM© Domino© Administrator application.
- Ask for a DAOS enabled version from SWING Software (support@swingsoftware.com).

Browse Documents by Company Departments

To be able to do this, you need to utilize two powerful features of SWING DocPublisher's.

- Manage document properties.
- Manage views.

First, let's create a custom document property. Go to the "Administration" tab of DocPublisher and under the "Customization" section click on "Manage document properties" link. Click on "Add new property" button.. We will set all the options as per screenshot below.



Name the property "Department" and select "Choice" as the property type. Selecting this type will add a combo box under properties tab (in the authoring mode) which will list our department names. Depending on specific requirements, you can also choose other property types.

Under "Description" it is always good to write at least a line of descriptive text about the new property. "Description" will be displayed along side the property field later when you create a new document. For demonstration purposes we will set the description to "Name of the department to which this document belongs to."

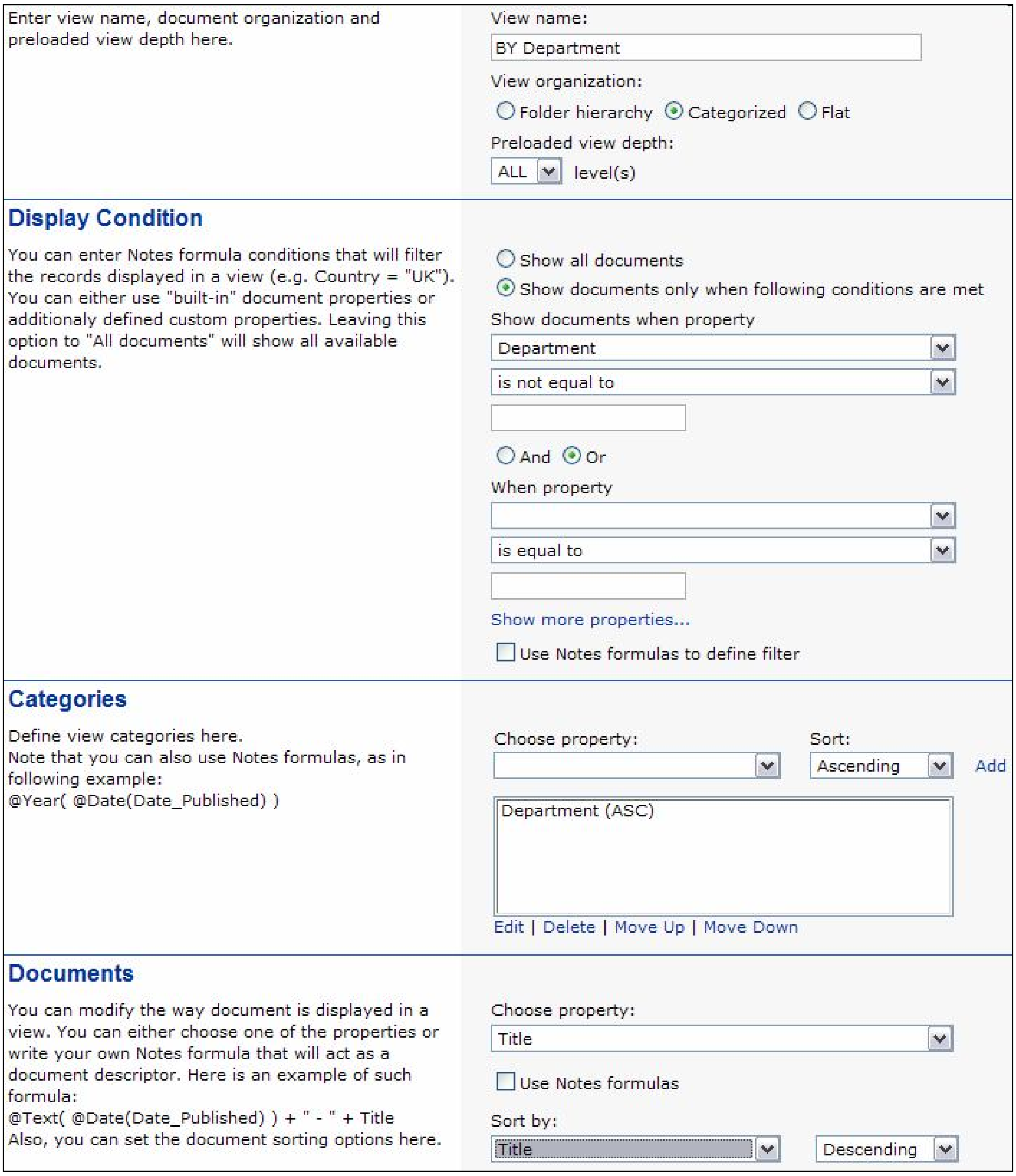
Under the "Require that this property contains information" section, select Yes if you wish to disable publishing of a document when no Department value is selected, otherwise select No.

Under the "List of choices" we will select the "Fixed" option since we will create a list manually now. If your choice list needs to be dynamic and not predetermined, you can select the "Evaluated by notes formula" option.

Now add some department names in each line to make up a list and select a default value that will be automatically set when the property is used. If a document can pertain to more than one department, select Yes to allow multiple selections, otherwise click No. If you want to enable document authors to add new departments to this list when creating a document, select Yes to allow values not in list, otherwise select No.

Click "OK" and your new property is created.

The next thing that needs to be done is the creation of a new custom view that will display your documents according to departments. Go to the Administration areaof DocPublisher click on the "Manage Views" link. and the click on the "Add New View" button. A new "Custom View Setup" dialog will open up. We will set all the options as per screenshot below.

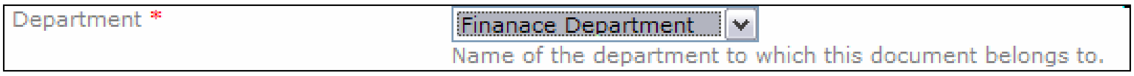


Name the new view "By Department". It's always good to keep view names short and simple for good display and meaningfulness. Set "View organization" to "Categorized" with "ALL" levels of preloaded view depth. This will ensure that we have a hierarchical tree view in the left pane.

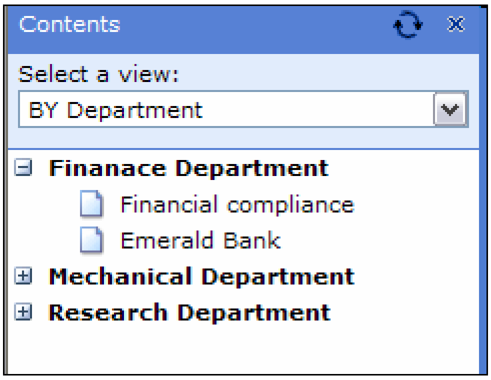
In the "Display Condition" section set the "Show documents only when following conditions are met" and "Show document when property" to our previously created "Department" property. Set the compare operator to "Is not equal to" and leave the next field empty. This means that all documents that have some text set for their "Department" property will be displayed while others will not.

In the "Categories section" chose the "Department" for our property, select "Ascending" sorting and click "Add". This will have the documents categorized by departments in ascending order . Finally, under the "Documents" section you should configure how the documents will be presented in your new view. Set "Title" for the property and set the "Sort by" to "Title" and "Descending" to make them sorted by their title name. Click "OK" to save the new view.

This is it. All you need to do now is test it out. Switch to "Authoring tab" and create a few documents (notice that under their "Properties" tab you have a new property called "Departments").



When you have a few documents published pertaining to different department you can switch to the "Contents" tab and in the select view dropdown menu select our newly created "By Department" view.



View documents that have or are about to expire

This operation is very similar to the one above except that it does not require you to create any new document properties but only document views (the property which we will use to create the views is already available, it is called "Expiration_Date").

Now we will make two more views. One will be named "Expired documents" (it will display all the documents that have expired until today) and the other named "Expiry in 5 days" which will show documents that are about to expire in the next five day from today.

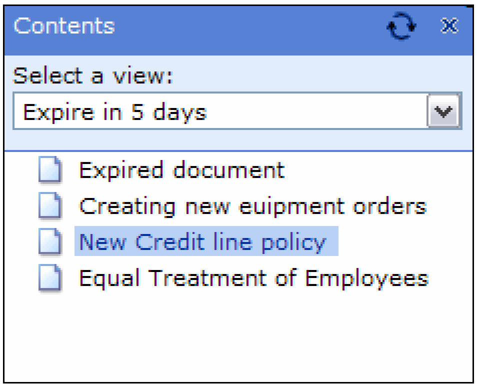
Create a new view like the one in the previous How To section and set these settings:

Property name	**Value**
View Name	Expired Documents
Type	Flat

Display Condition	Show documents only when following conditions are met. Use Notes formulas to define filter
Notes Formula Filter	Expiration_Date < @Today
Other settings	Choose according to your needs.

For the "Expire in 5 days" view create yet a new view with the following settings

Property name	**Value**
View Name	Expiry in 5 days
Type	Flat
Display Condition	Show documents only when following conditions are met. Use Notes formulas to define filter
Notes Formula Filter	(Expiration_Date - @Today) /86400 <=5
Other settings	Choose according to your needs.
Note that if you wish to make it 7 or 10 days all you need to do is to edit the Notes Formula field and replace the number at the left end of equation.	

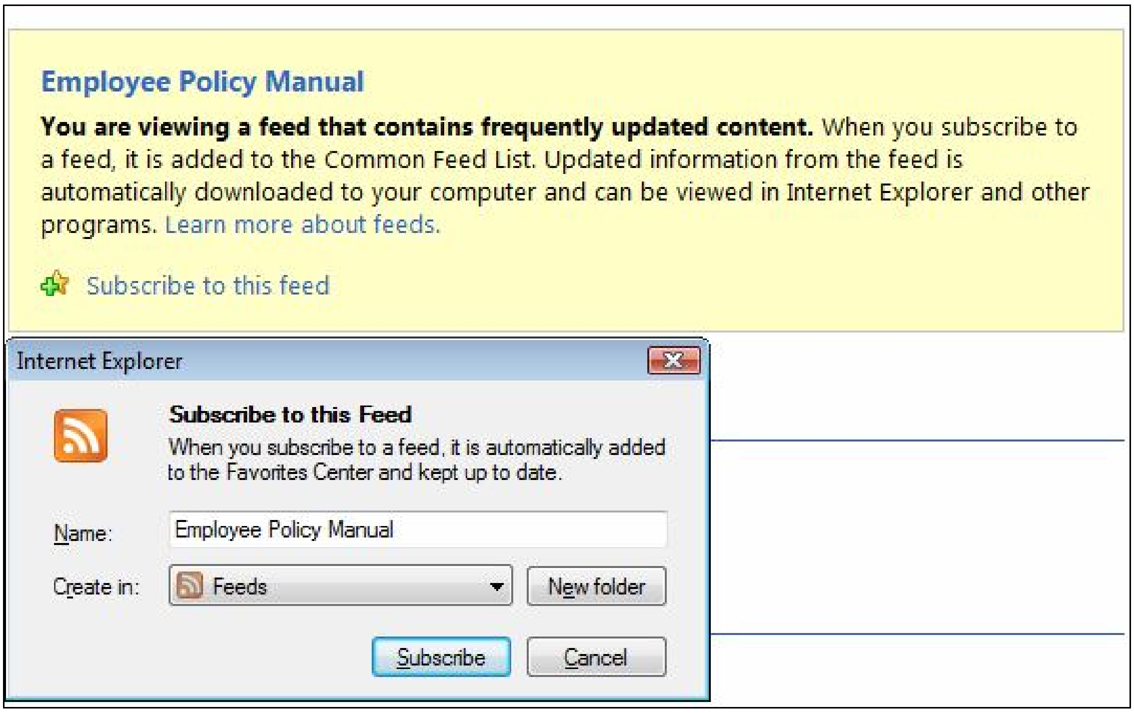


Easily track document changes from your Vista desktop

The easiest way to track changes that have been applied to documents inside DocPublisher databases is by using RSS feeds. There are numerous feed readers and applications to choose from, but here we will be concentrating on a Microsoft © Windows Vista© built-in tool (or gadget) called "Feed Headlines" which is a part of Windows Vista Sidebar.

"Feed Headlines" is a good choice because it looks good, and is simple to use and manage right from your desktop. It displays only headlines, which is great because DocPublisher's RSS feeds display only changes and if you are interested in observing them fully, you need to be able to easily open the document in your browser. All of that is present in this simple gadget.

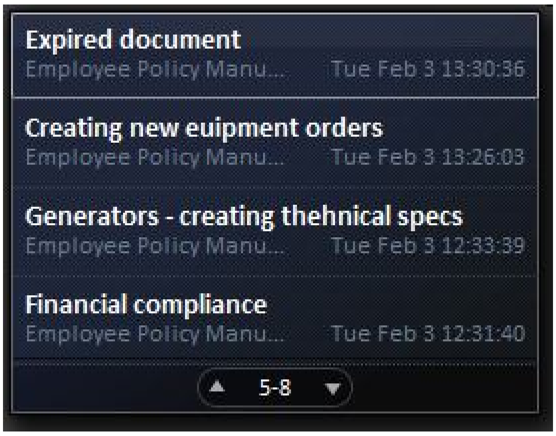
First thing that needs to be done is to navigate to your DocPublisher database (using IE7) and open the "Recent Updates" section of the left pane (in "Content" tab). Click on "Subscribe" to create a new Internet Explorer RSS Subscription. Complete the subscription and remember the name of the feed you have subscribed to (In the case of the default DocPublisher database this name is "Employee Policy Manual").



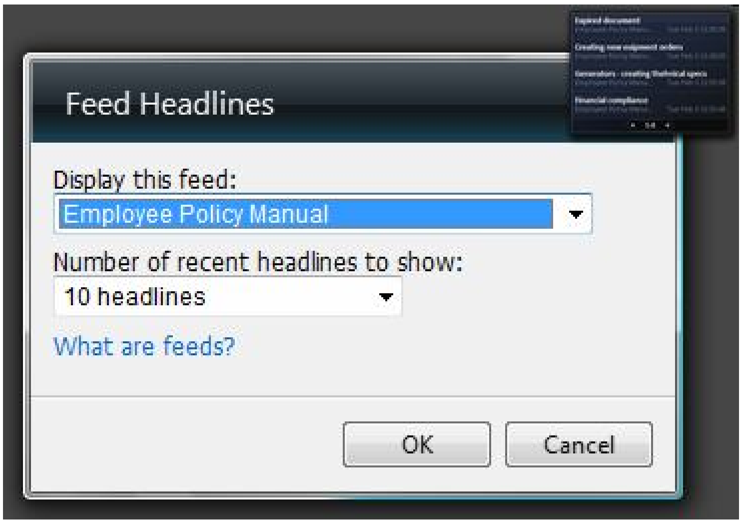
After the subscription is complete, go to your Vista Sidebar and right click the "Feed Headlines" gadget if you have it enabled and visible. Go to "Options".

Information

If the gadget is not open then in the sidebar then right click the sidebar and go to "Add Gadgets..". The "Feed Headlines" gadget should now be available for picking. Double click it to add it to the sidebar.



After you have opened the gadget's options section, you will need to populate two fields. First is name of the feed to display. This is the name we gave the feed inside Internet Explorer ("Employee Policy Manual") and should be available for pick from the dropdown. Set the number of Headlines as you prefer and click OK.



Your change tracking through feeds is now enabled for the ("Employee Policy Manual") DocPublisher database. You can do the same for all other DocPublisher databases you wish to monitor in this manner.

Feel free to drag the gadget out of the sidebar to get some more room. If you click on a headline a new window will pop-up on the right displaying the name of the document and the database name in the top section. This is also a hyperlink that will open the mentioned DocPublisher database in your default browser.

There is some other information contained here (in the white text box). This is the same text entered in the "Description of version" field while the document was created or a new revision was made. It is very informative and should give you the best quick info on the change made to the document. This is also another good reason to keep writing good "Description of version" texts in DocPublisher.

Check the list of people that didn't sign your document(s) yet.

The easiest way to check on people that haven't yet signed-off on a document is to open the "Signoffs" tab of that document in the "Authoring" mode.

Here you will find a quick information on percentage of people/groups who have signed the document as well as a more detailed report table. Depending on the option selected in the Display dropdown you are able to view users who have been added to the signoff list, users that have signed-off on the document as well as ones that have not done so. Users that have not signed-off on a document can be sent a reminder in a form of an email notification by clicking on a "Send Reminders" action link located below the table.

Chapter 5

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Chapter

6

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